



SMART

**Performance
Management**

Employee Guide

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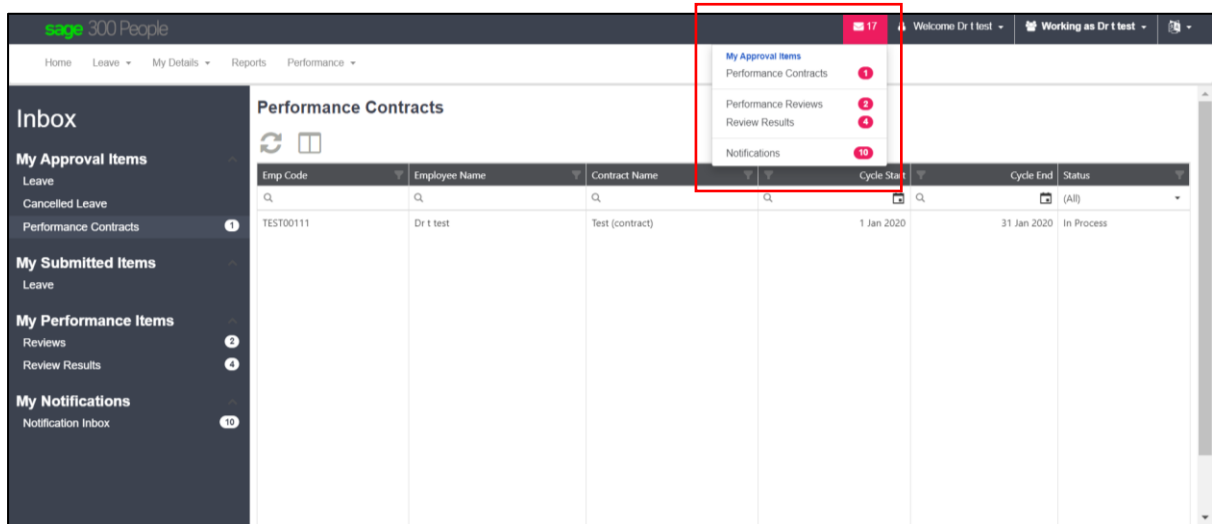
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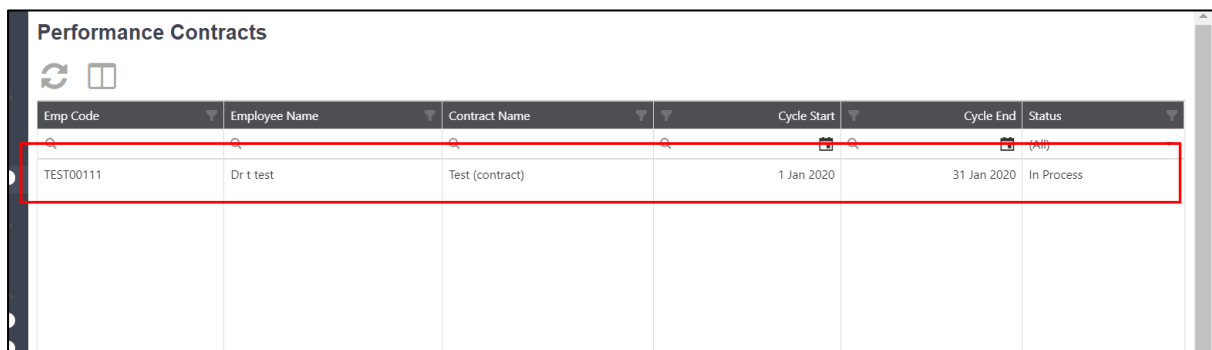
SECTION 1: PERFORMANCE CONTRACTING

Performance Contracting is the process by which an Employee and Manager agree on the KPI's that will be considered in the Performance Reviews for the next performance cycle. The Employee will be rated on these agreed-upon KPI's.

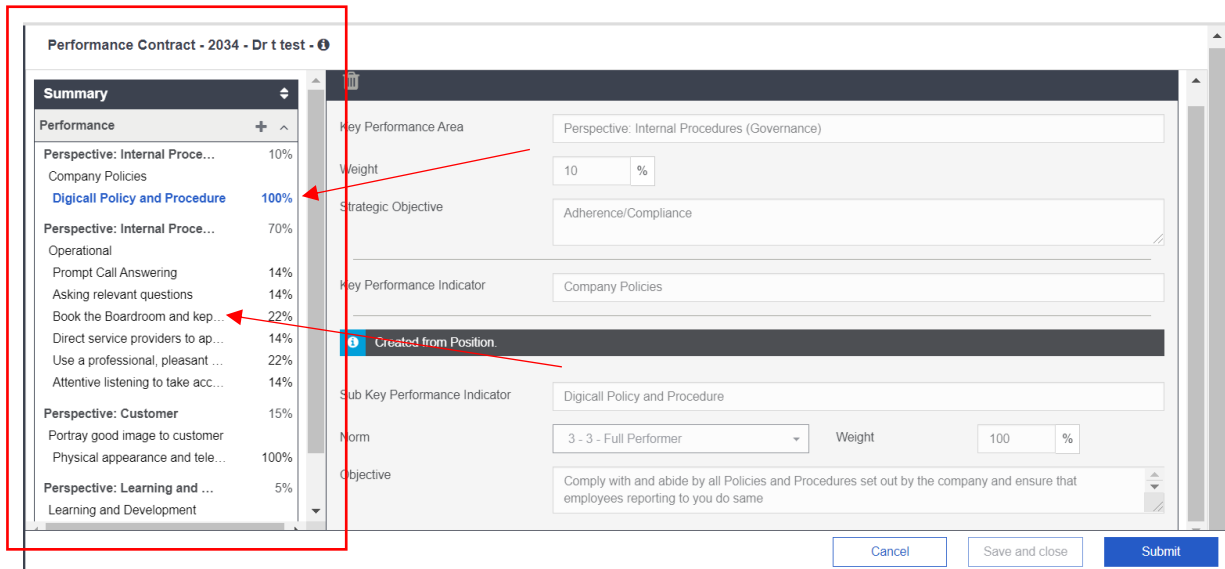
1. Navigate to the performance contract in your inbox by clicking on the red inbox item. Select the *Performance Contracts* inbox item.



2. The following screen will appear. Select the performance contract by clicking anywhere on the line item.

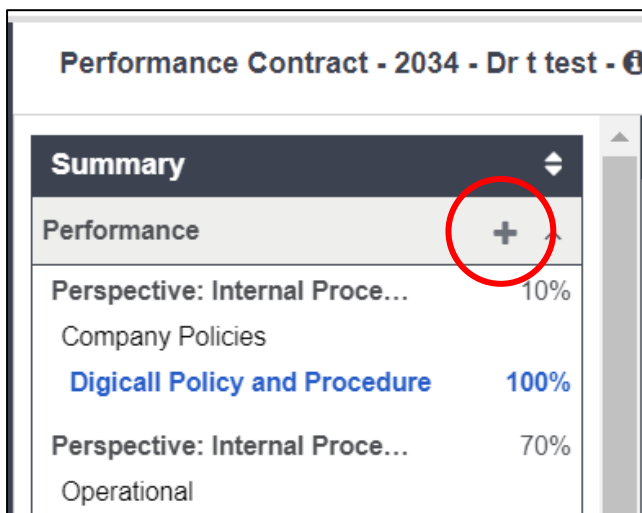


3. The Performance Contract will open. Use the *Summary* tab on the left-hand side of the screen to open each KPI (clicking on each line will open that KPI).

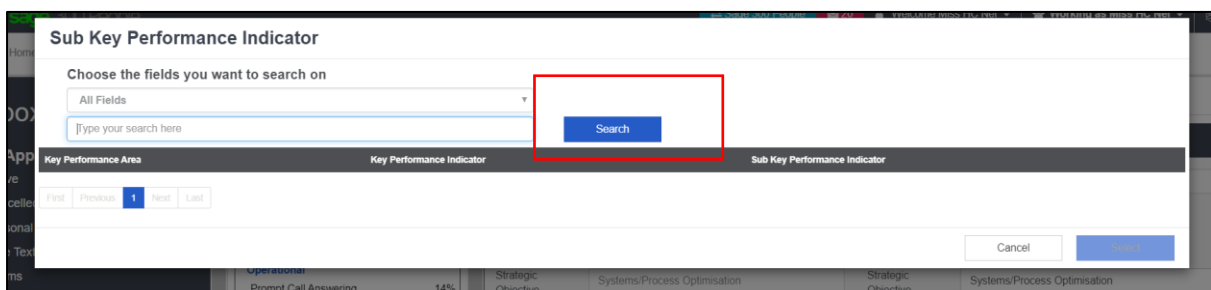


4. Edit the contract by clicking in any field in the Proposed Changes section and deleting or altering the text.
5. You can also add or remove KPI's:

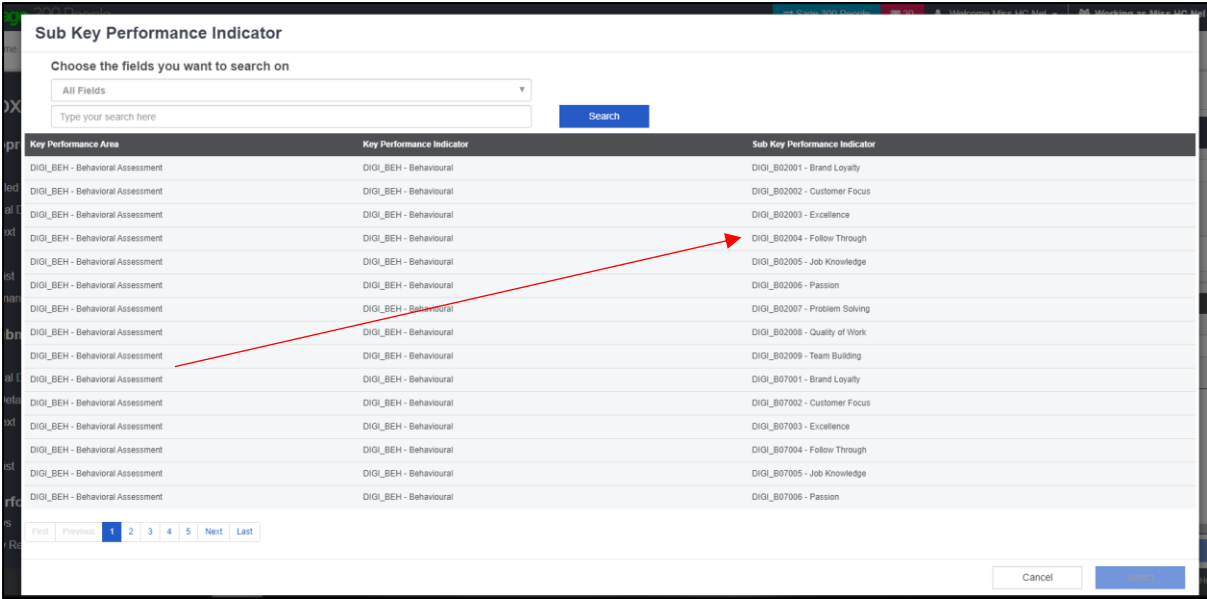
Add KPI's by clicking on the plus icon next to *Performance* on the summary tab.



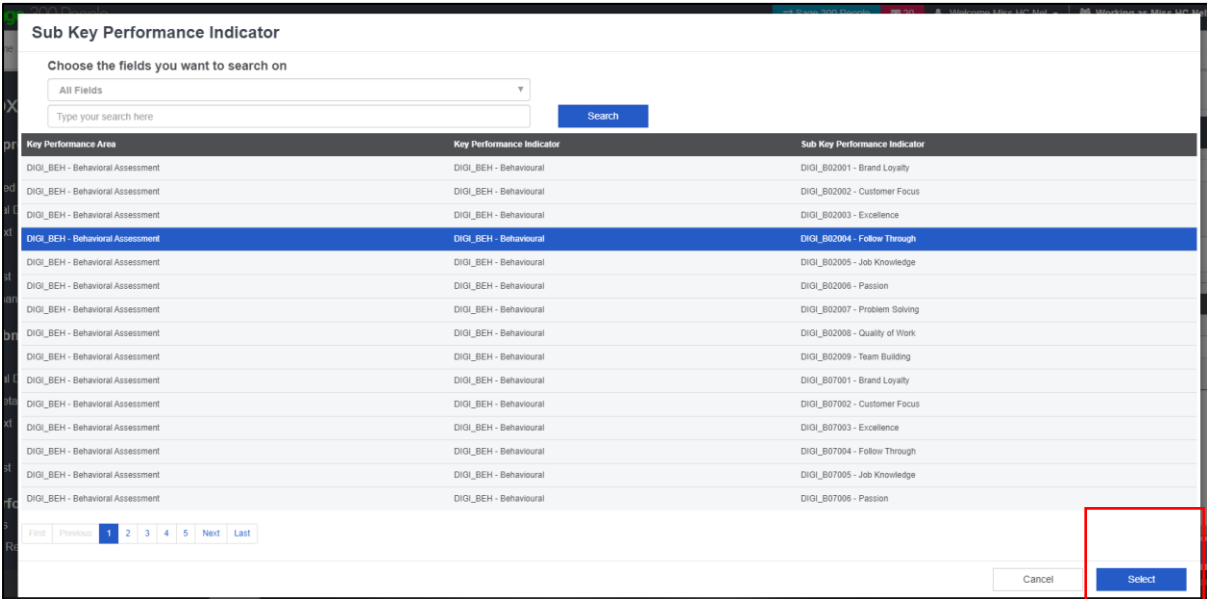
The following screen will appear. Click on Search.



A list of all KPI's that are currently loaded on the system will appear.

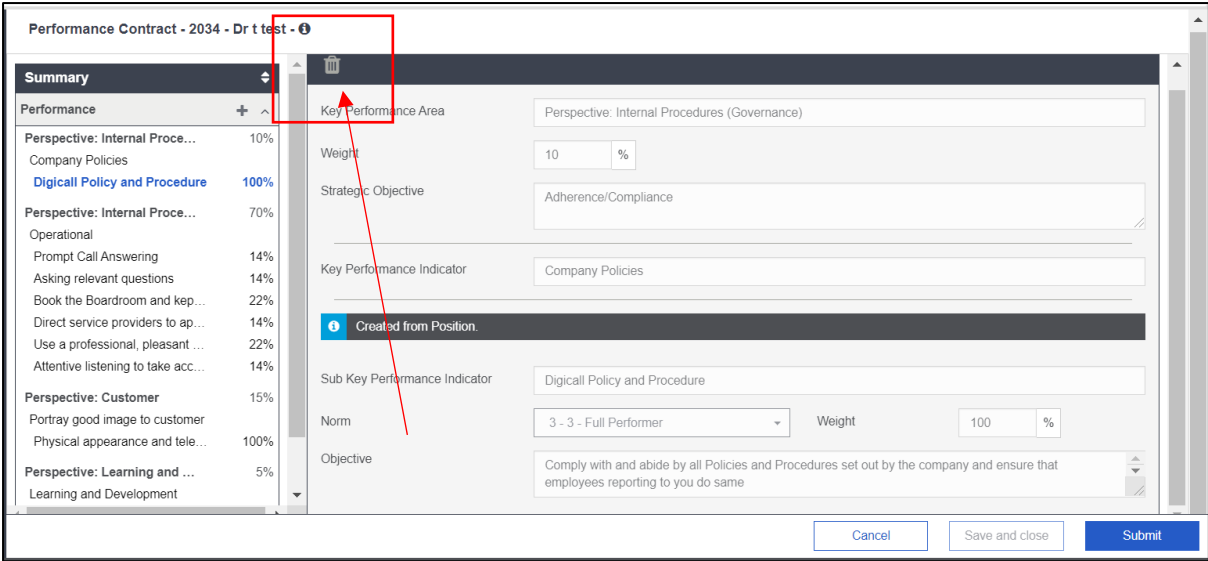


Click on the KPI that you would like to add, then click on *Select*. Please note, if you want to add a KPI that has not been pre-defined on this list, search for 'Free Text' and a list of blank KPI's will appear that you can add and edit.

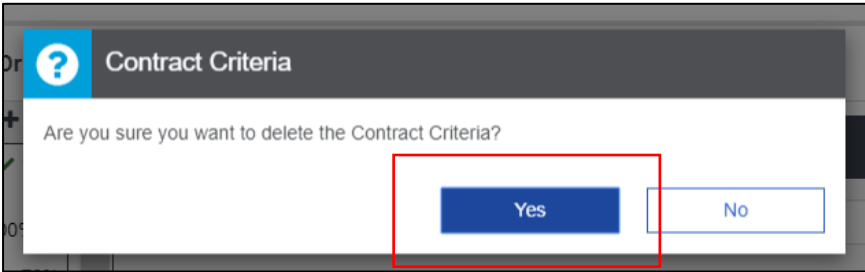


After adding a KPI, be sure to edit the weights of the KPI so that you adhere to the weight requirements (all Perspectives should add to 100, all KPI's should add to 100).

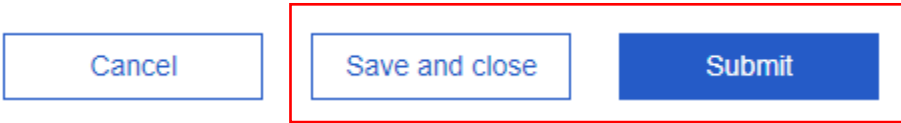
Remove KPI's by selecting the KPI that you want to remove, then clicking on the delete button in the left corner of the KPI.



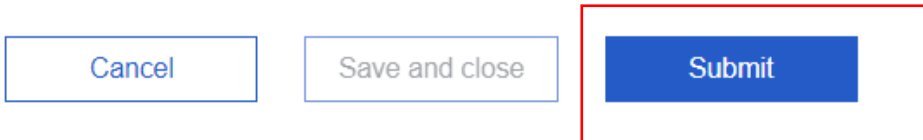
Confirm the deletion by clicking Yes.



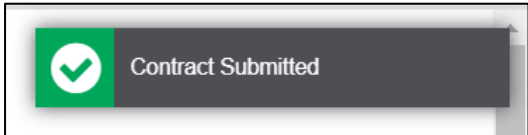
6. After you have Edited the performance contract as needed:
 - Save and Close: This option will save the contract but keep it in your inbox so that you can access it later.
 - Submit: This option will submit the contract as final and remove it from your inbox completely.
 - Cancel: This will cancel all the changes you made to the contract but still keep the contract in your inbox.



7. After you have read through the performance contract, click *Submit*.



8. You will receive the following notification to confirm submission of your performance contract.

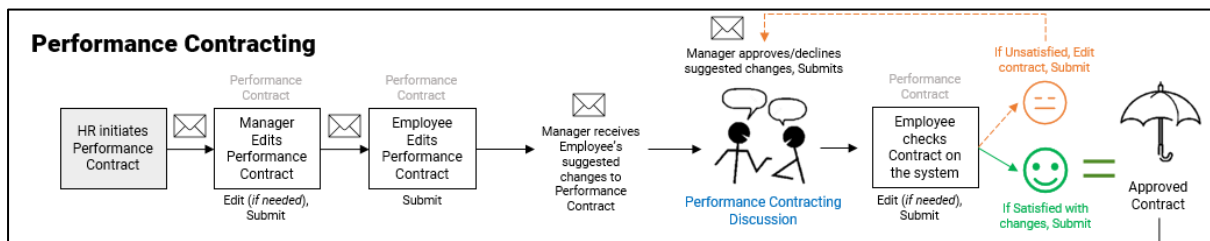


Once you have submitted your performance contract, your suggested changes will be sent to your Manager for approval. At this point, have the contracting discussion with your Manager so that you can discuss the suggested changes and your Manager can Accept or Decline the suggested changes on the system.

After your contracting discussion, your Manager will Submit the contract and it will be returned to your inbox for a final time. This is so that you can see the final version of the contract that you will be rated on during the review. As a last step, you can either:

1. Submit the contract without making any changes, if you are satisfied with the contents of the contract, OR
2. Edit the contract again, which will return it to your Manager for approval if these suggested changes.

Note: If you Edit the contract at this point, the contract will be sent to your Manger's inbox for approval. After the Manager Submits the contract will be sent to you again (you are the last approver in the contracting process). Please refer to the process map.



SECTION 2: COMPLETE A REVIEW

Employees will receive an email (and WebSS notification) to announce that the performance review is ready for completion.

Note: Your Manager needs to give you a deadline for completion of the review.

Contract Review Notice

Notification Details

Dear Ena

Please complete the Performance Review for Miss HCN Nel on your Self Service portal by 2019/09/30.

Footnote Information

Kind Regards, Digicall HR Team

1. Navigate to your inbox and select *Performance Reviews*. Select the applicable review

sage 300 People | Sage 300 People 17 | Welcome Miss HC Nel | Working as Miss HC Nel

Home | Leave | Claims | My Details | Payslips | Reports | Free Text Workflow | Performance | Tax Certificates

My Approval Items

- Unapproved Reviews (1)
- Performance Reviews (3)**
- Review Results (1)
- Notifications (12)

Miss HC Nel

- View Inbox
- New Leave Application
- Submit Claim
- View Payslips

My Payslips

Latest payslip
31 Dec 2019

My Tax Certificates

Latest tax certificate
None

My Submitted Items

Leave: 0 | Claims: 0

Upcoming Birthdays

Vaughn Botha ☆ 03 Apr
test test 29 May
Helena Nel 30 Aug

... have submitted for last 365 days

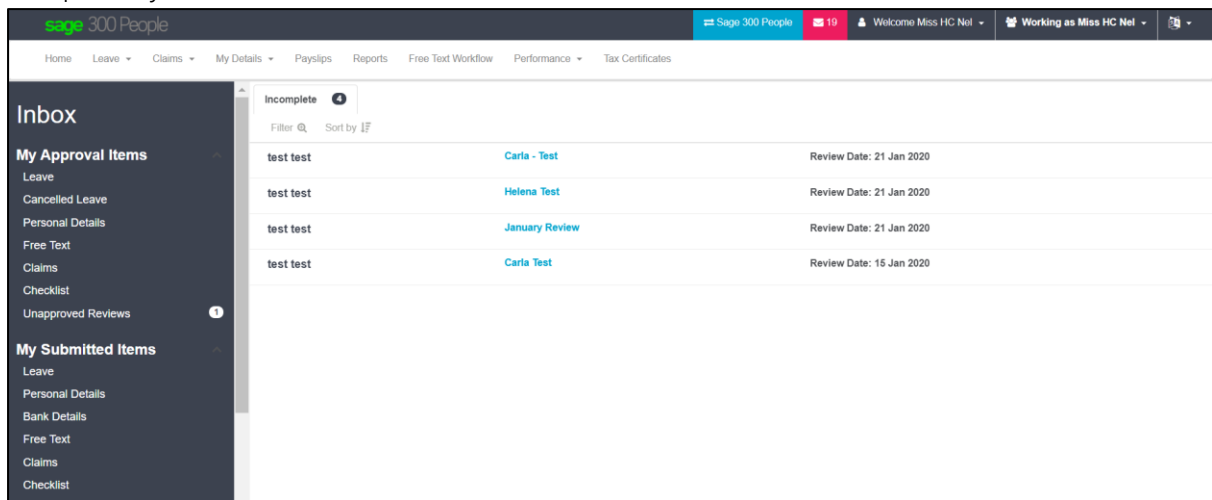
No data

DIGICALL

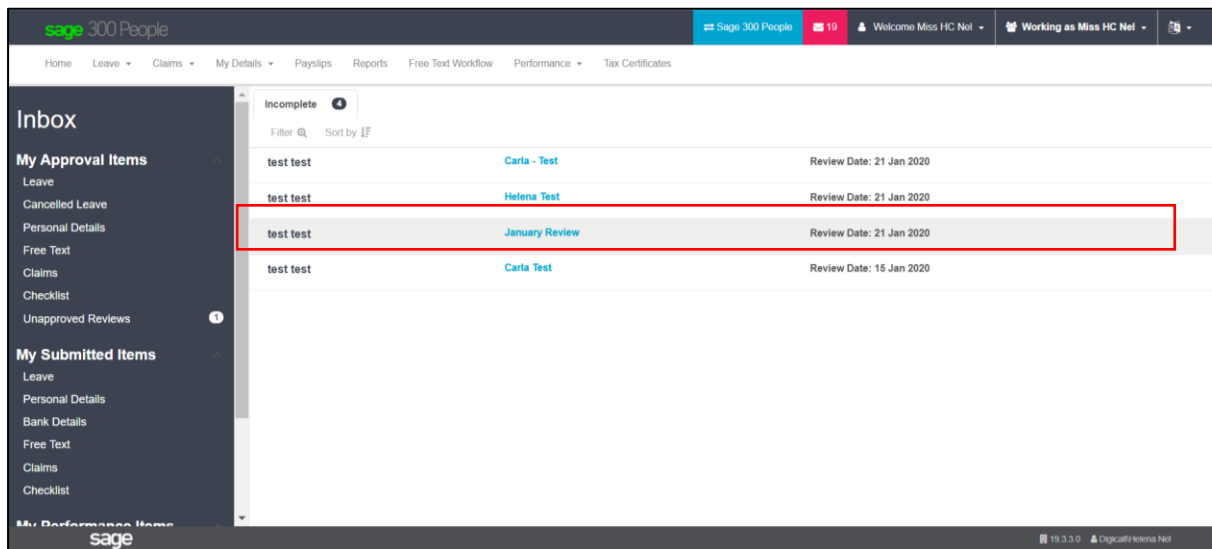
Today | January 2020 | Year | Month | Week

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

The following screen will open, with a list of all the performance reviews that have not been completed yet.



2. Click on the review that you want to complete.



3. Use the *Summary* tab on the left-hand side of the screen to navigate to each level of the performance review.

Summary 100 %

Performance ✓

Perspective: Internal Proce...	10%	✓
Company Policies		✓
Digicall Policy and Procedure	100%	✓
Perspective: Internal Proce...	70%	✓
Operational		✓
Prompt Call Answering	14%	✓
Asking relevant questions	14%	✓
Book the Boardroom and kep...	22%	✓
Direct service providers to ap...	14%	✓
Use a professional, pleasant ...	22%	✓
Attentive listening to take acc...	14%	✓
Perspective: Customer	15%	✓
Portray good image to customer		✓
Physical appearance and tele...	100%	✓
Perspective: Learning and ...	5%	✓
Learning and Development		✓
Continuous Learning and Dvlp	100%	✓

Overall Comments

Annotations:

- This indicates the percentage of completion for the whole review
- Always click on the lowest level to rate (the rows indented furthest to the right)
- The green checkbox indicates that the KPI has been completed
- Once the section has been completed, the *Perspective* will also have a green checkbox next to it
- Weight of the section
- Weight of the KPI

Note that you will only be able to score on the lowest level (on the example below, you will not be able to rate on the *Perspective: Internal Procedures* line, nor on the company Policy line, but on the last level of the section, *Digicall Policies and Procedures*).

Performance Contract - Dr t test

Summary 0 %

Perspective: Internal Proce...	10%	○
Company Policies		○
Digicall Policy and Procedure	100%	○
Perspective: Internal Proce...	70%	○
Operational		○
Prompt Call Answering	14%	○
Asking relevant questions	14%	○
Book the Boardroom and kep...	22%	○
Direct service providers to ap...	14%	○
Use a professional, pleasant ...	22%	○
Attentive listening to take acc...	14%	○
Perspective: Customer	15%	○
Portray good image to customer		○
Physical appearance and tele...	100%	○
Perspective: Learning and ...	5%	○
Learning and Development		○

Rating Form:

- Created from Position
- Sub Key Performance Indicator: Digicall Policy and Procedure
- Weight: 100 %
- Objective: Comply with and abide by all Policies and Procedures set out by the company and ensure that employees reporting to you do same
- Rating:
 - N/A - Not Applicable
 - 1 - Non Performer
 - 2 - Developing Performer
 - 3 - Full Performer
 - 4 - Exceptional Performer
- Actual Result
- Comment on Review

Buttons: Cancel, Save and close, Submit

4. Complete the rating by selecting the applicable radio button. Choose from the following list:

- 1 – Non-Performer
- 2 – Developing Performer
- 3 – Full Performer
- 4 – Exceptional Performer

- 1 - Non Performer
- 2 - Developing Performer
- 3 - Full Performer
- 4 - Exceptional Performer

5. The Actual Result field can be used to capture more specific evidence or results (e.g. sales targets or a number of calls). However, this field is not mandatory.

Actual Result

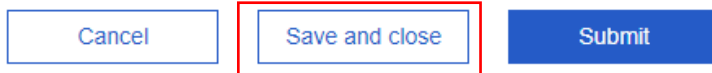
6. Complete the *Comment on Review field* (this will always be a mandatory field, and you will not be able to submit your Review without completing this field for each KPI). Use the *Comment on Review* field to briefly motivate why you gave a specific rating for yourself on this KPI.

Comment on Review

7. Complete overall comments. Provide overall comments on performance in the *Overall Comments* block. This field can be used to capture any general comments that you have regarding your performance or noting any significant developmental areas that you feel you need to focus on.

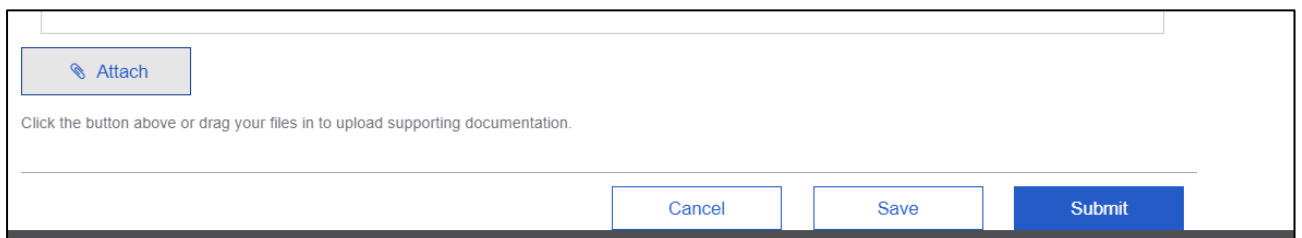
Summary		100 %
Performance ✔		
Perspective: Internal Proce...	10%	✔
Company Policies		✔
Digicall Policy and Procedure	100%	✔
Perspective: Internal Proce...	70%	✔
Operational		✔
Prompt Call Answering	14%	✔
Asking relevant questions	14%	✔
Book the Boardroom and kep...	22%	✔
Direct service providers to ap...	14%	✔
Use a professional, pleasant ...	22%	✔
Attentive listening to take acc...	14%	✔
Perspective: Customer	15%	✔
Portray good image to customer		✔
Physical appearance and tele...	100%	✔
Perspective: Learning and ...	5%	✔
Learning and Development		✔
Continous Learning and Dvlp	100%	✔
<div style="border: 1px solid red; padding: 5px; display: inline-block;"> Overall Comments ↻ </div>		

8. When completing the review, it is important to save regularly. Click on *Save and Close* to ensure that your work is not lost (i.e. in case the system times out, or the internet connection is interrupted).



Please note that once the review has been submitted, it will be removed from your inbox completely. If you want to continue working on the review later – please make sure that you select Save and Close and NOT Submit.

9. Add Attachments (if applicable). Any supporting documents or performance evidence can be attached by clicking on the paperclip and attaching the document as you normally would. This is not a mandatory field.



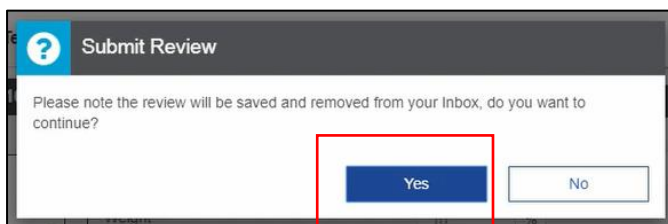
10. Once your review is fully completed, you can Submit the review.

Remember:

- *Save and Close*: This option will save the review and keep it in your inbox for completion later.
- *Submit*: This option will submit the review as final and remove it from your inbox.

*Please note that once the review has been submitted, it will be removed from your inbox completely. It is therefore important to ensure that you are completely satisfied with your ratings before clicking **Submit**.*

11. The following notification will appear. Click on Yes to submit your review.



12. Once both the Manager and Employee have submitted their ratings, the review is now captured and complete.

Now it is time to have your face-to-face discussion with your Manager. After this face-to-face discussion, your Manager will be able to capture discussion ratings. Calibration may also be required (top management). After this, your Manager will release your review results to your inbox – you will need to acknowledge these results. Go to **SECTION 2: REVIEW RESULTS to find out how to acknowledge review results.**

SECTION 3: DEVELOPMENT PLAN

During your Performance Review, you would have identified areas of development and training needs with your Manager. Use the Development Plan section to capture the intervention or steps needed for you to develop in these identified areas.




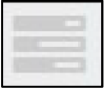


The Development Plan consists of the following sections:

- My Development Plans
- My Completed Items

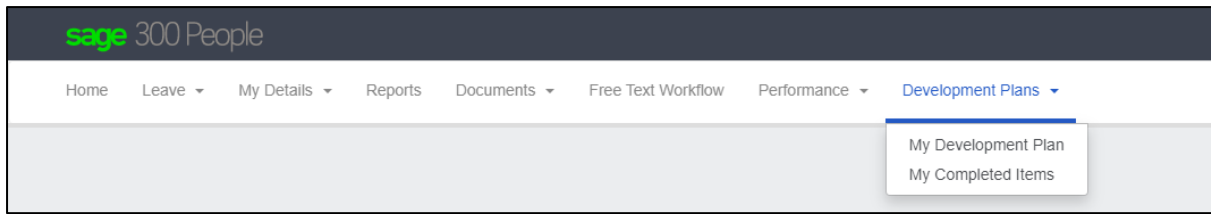
For all other Development Plan items, the Reports To Manager will be responsible to approve or decline the specific development items. This information is then provided to the HR team and considered for inclusion in the training plan.

Section 1: My Development Plan

Please note the meaning of the Action buttons that appear on each section:

Icon	Description	Function
	Add	When you add a new item, a detailed development plan screen will open to define the specific developmental item.
	Edit	Edit an existing development item. This functionality is limited on training items which follow a workflow.
	Delete	Delete an existing development item. The delete functionality is limited on training items as these items are submitted to a workflow.
	Status	Update the development item status using this button.
	Export	Export the current list of development items here. All fields will be exported to Excel.
	Expand / Collapse	Use these buttons to expand or collapse different sections.

1. To log your Development Plan, log into ESS and expand the Development Plans tab. Select My Development Plan.




The following screen will display. Note the different sections to the Development plan below. We will be making use of those highlighted in green (although you can use more of these sections should you choose to do so).

- a) Short Term Goals
- b) Long Term Goals
- c) Performance Development
- d) Current Position Development
- e) Succession Role Development
- f) Personal and Compulsory Development



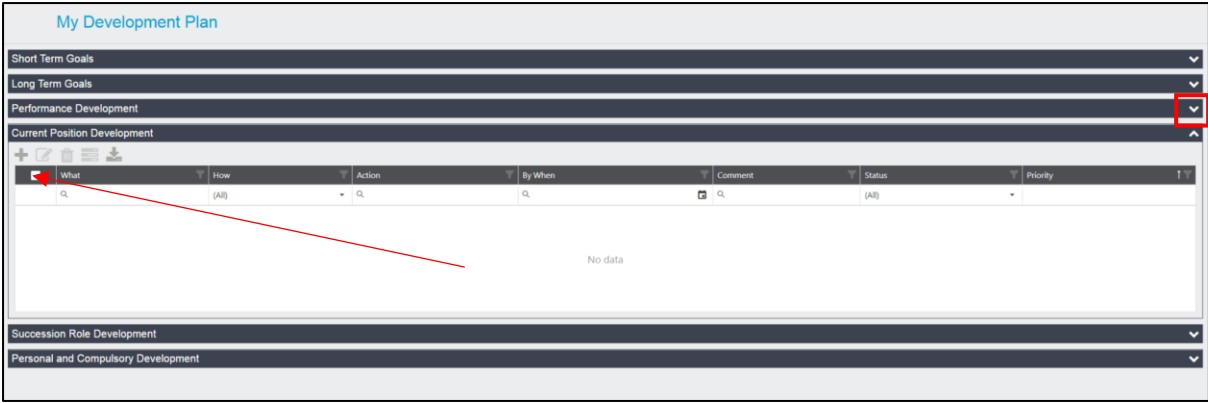
2. Short- and Long-Term Goals

The system will open with the Short- and Long-Term Goals displayed. The user can load his personal goals here. These fields have unlimited characters and will be saved by selecting the Save button at the bottom of the screen. No history will be kept on changes made to the Short

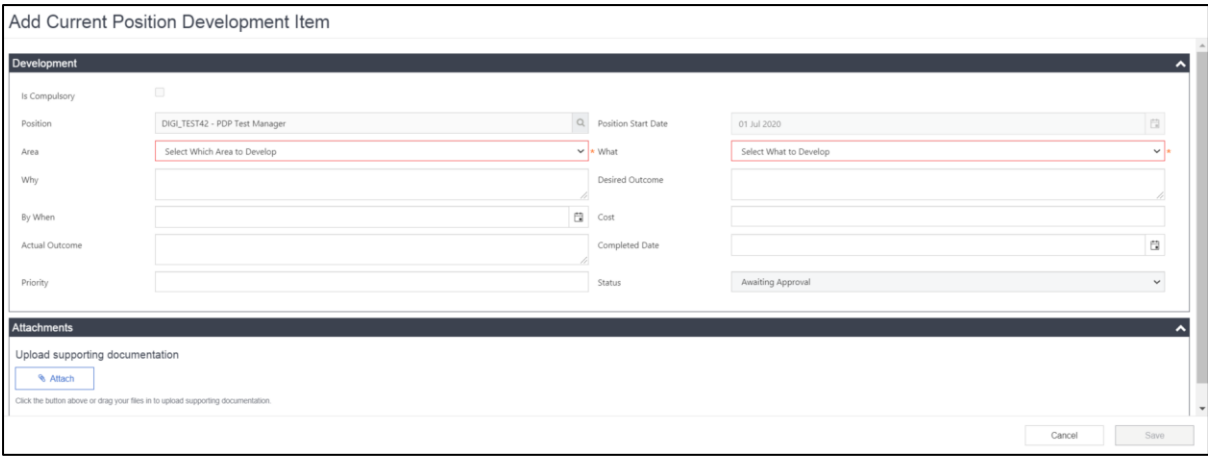
and Long-Term goals. These two sections can be collapsed or expanded by selecting the  icons or by clicking on each header.

3. Performance Development

After completing a Performance Review, capture the developmental areas that you identified in your review here. Expand the Performance Development section. Click on the plus icon.

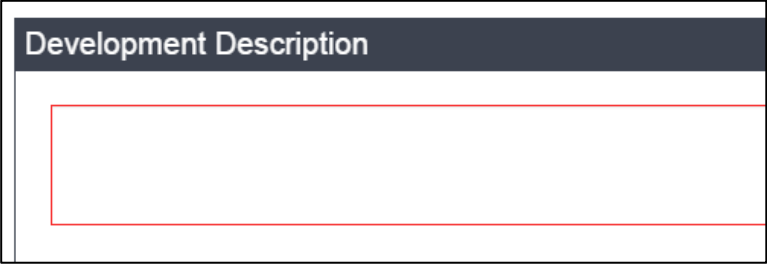
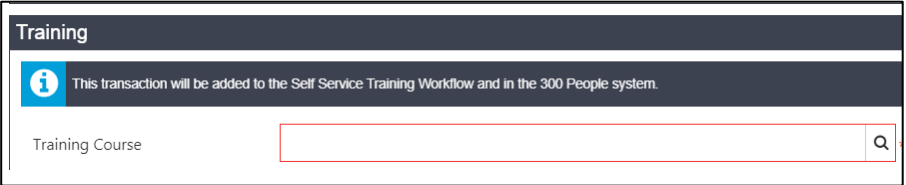



The following screen will display.



4. Complete the fields as guided below.

Field Name	Description
Position	The Position field will default to the current position linked to the employee.
Position Start Date	Defaults the date when the employee started in this position.
Area (Mandatory)	Select the Performance option (you will notice that there are options for Competencies and Skills, however these fields are not currently available).
What (Mandatory)	The Performance Indicators linked to the position will appear as a drop-down list. Select which Performance Area you would like to develop.
How (Mandatory)	Select from Training Mentoring, Self-study, or Other. This is the method by which you will develop this Performance Area.

	<p>Note, if you select Mentoring, Self-Study or Other, you will only be asked to describe the development in more detail.</p> <div data-bbox="475 293 1246 555">  </div> <p>However, if you choose the Training option, you are conveying a specific training need to the HR team for consideration. Here you will need to complete at least the Training Course and the Training Description.</p> <p>Click on the Magnifying Glass to view a list of pre-populated training courses.</p> <div data-bbox="475 815 1385 999">  </div> <div data-bbox="475 1088 1385 1261">  </div>
Why	Motivate why you need development in this area, and why the method chosen above is appropriate.
Desired Outcome	Explain the outcome you would like to achieve.
By When	Specify the date of completion.
Cost	If applicable, specify the cost of the intervention.
Priority	This is an optional field that you can use to place a list of developmental items in order of priority.

5. Once you have completed, click on Save.
6. Your Manger will now receive a notification that you have submitted a new Development Item. They will be able to Approve or Decline this item, as well as leave comments.

Note the meaning of each status for your Development Item:

Awaiting Approval	The item needs to be approved by the Manager.
In Progress	Will display if the item has been Approved. This indicates that the employee has started with the development item.

	This option will only display when Mentoring, Self-Study or the Other option was previously selected.
Completed	Indicates that the items have been completed by the Employee, once the status is changed to completed the item will be moved to the My Completed Items section.
Completed	Indicates that the items have been completed by the Employee. Once the item is marked as Completed, it will be moved to My Completed Items section.
Closed-Incomplete	Indicates that the item has not been completed but will not be done anymore and therefore needs to be removed from the Employee's development plan.

Section 2: My Completed Items

This section shows a historical record for completed development items.

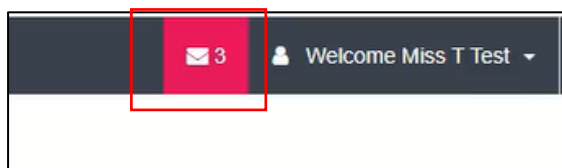
SECTION 4: REVIEW RESULTS

Your Manager will release the review results to you after the final Discussion Rating and Calibration scores have been completed.

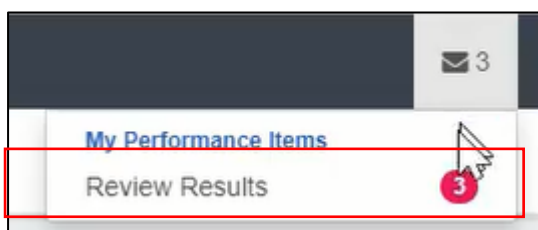
- **What is a Discussion Rating?** After having the face-to-face performance review discussion, Managers can capture a Discussion Rating in case they need to amend their original rating for the KPI. This is a third rating that overrides the original rating of the Manager.
- **What is Calibration?** Calibration takes place when managers present their team ratings to a more senior manager - ratings can then be amended if needed, to ensure that ratings are consistent, fair, and as objective as possible.

When your Manager has released the results to you, the system will send the final results to your inbox. Note: These results will remain in your inbox and will *not* be removed. **You will now need to acknowledge these results to complete the performance review process.**

1. Navigate to the review results by clicking on the inbox icon.



2. Select *Review Results*.



3. The following screen will appear. Search for the review that has a status of *Awaiting Acknowledgement*.

Review Name	Contract Name	Cycle Start	Cycle End	Review Status
TEST	FarmSol Standard Performance Template	1 Jan 2020	31 Jan 2020	Disputed
Jan Test Review	Training Contract	1 Jan 2020	31 Jan 2020	Disputed
Feb Performance Review	FarmSol Standard Performance Template	1 Feb 2020	29 Feb 2020	Awaiting Acknowledgement

4. Click on the appropriate review, then click on the eye icon to view.

Review Name	Contract Name	Review Status	Cycle Start	Cycle End
TEST	FarmSol Standard Performance Template	Disputed	1 Jan 2020	31 Jan 2020
Jan Test Review	Training Contract	Disputed	1 Jan 2020	31 Jan 2020
Feb Performance Review	FarmSol Standard Performance Template	Awaiting Acknowledgement	1 Feb 2020	29 Feb 2020

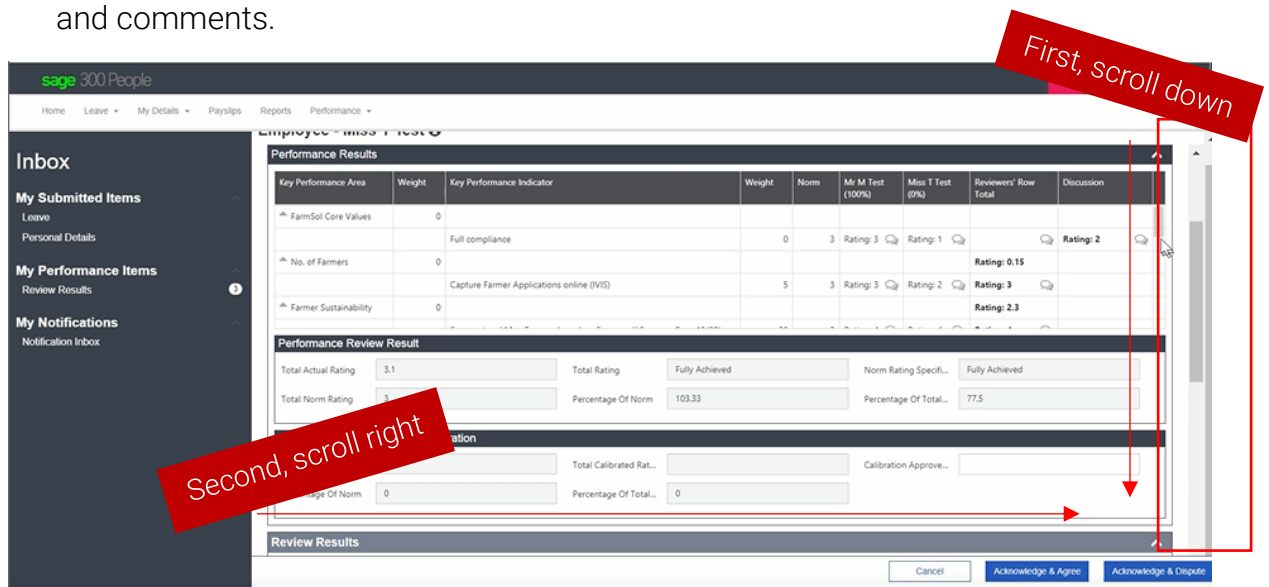
5. The following screen will appear.

Review Area	Weight	Total Actual Rating	Total Rating	Calibrated Rating	Norm	Percentage Of Norm	Percentage Of Total Score
Performance	100						
Review Totals							

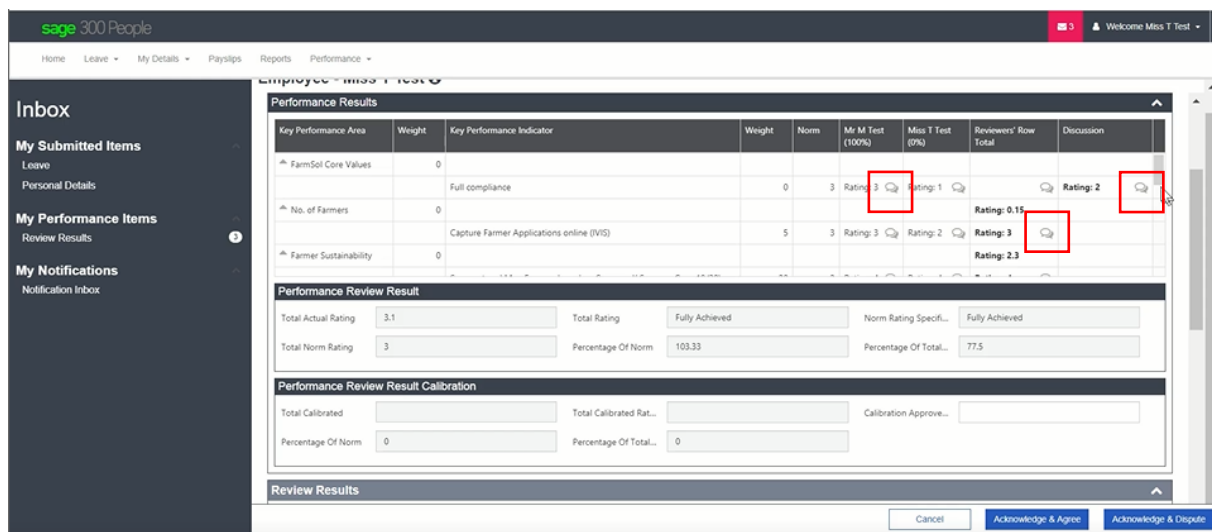
6. Click on the blue View button, next to the Performance line.

Review Area	Weight	Total Actual Rating	Total Rating	Calibrated Rating	Norm	Percentage Of Norm	Percentage Of Total Score
Performance	100						
Review Totals							

7. The following screen will appear. Scroll down, then to the right, to view ratings and comments.



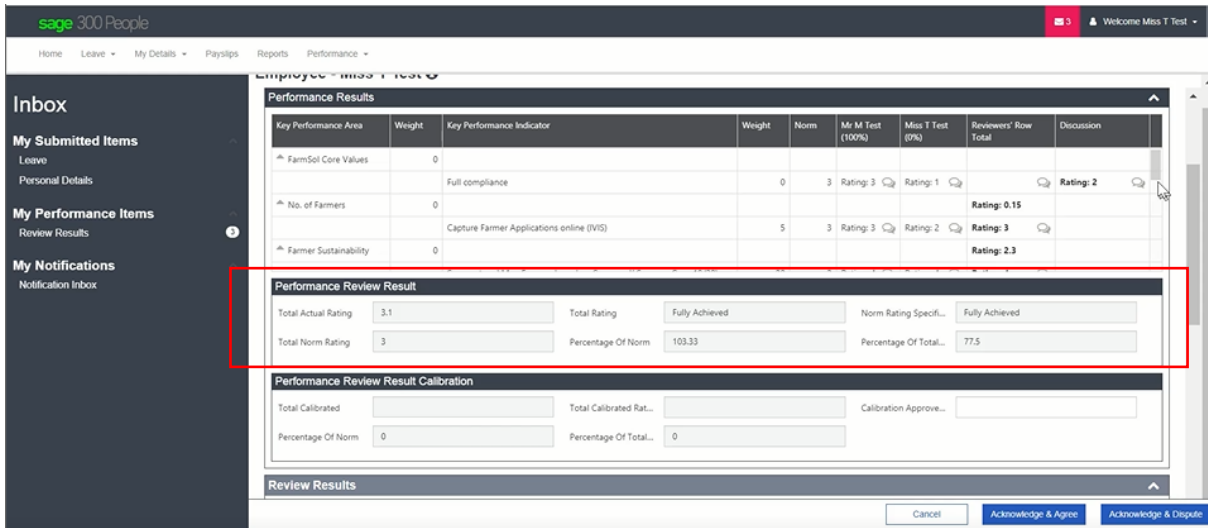
8. You can now read through the final ratings and comments. Click on the speech bubbles to view comments.



Comments will display as follows. Click on *Close* to close the popup.

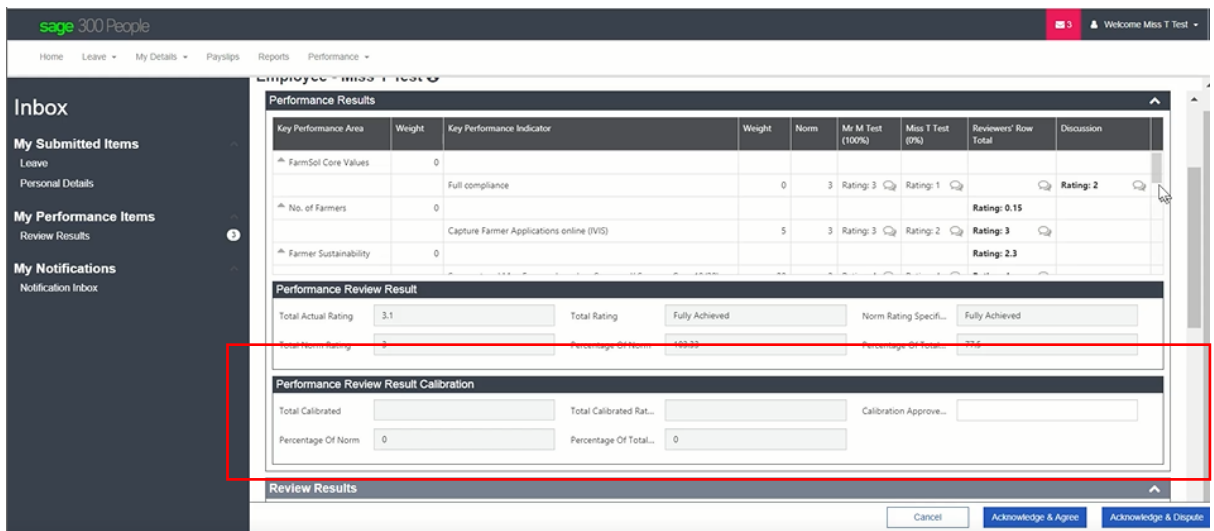


9. Interpret the Performance Review Result section as follows:

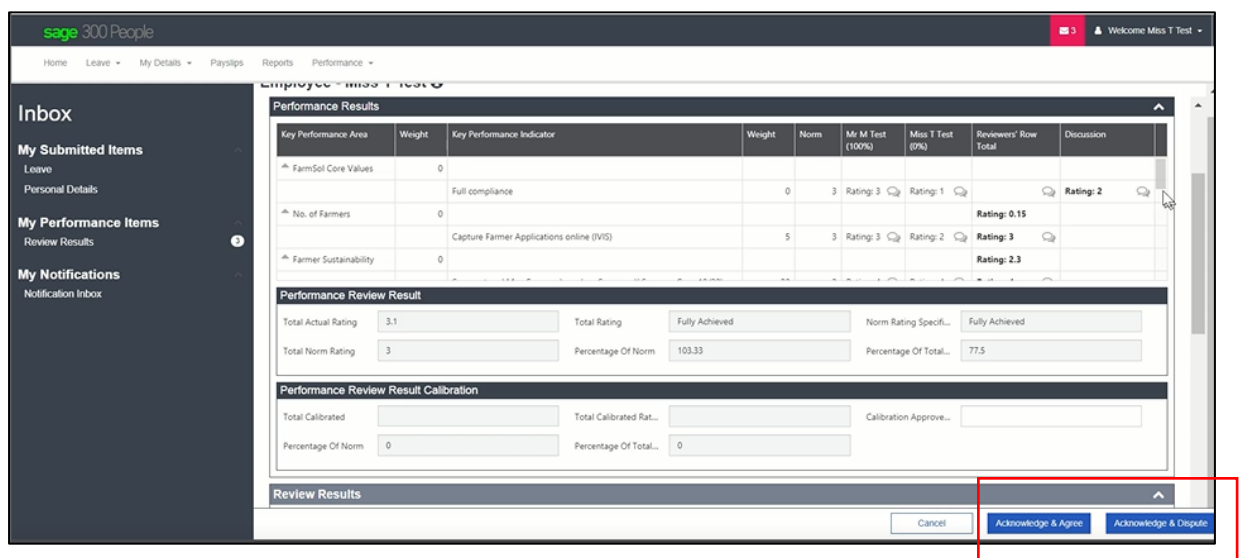


Item	Meaning
Total Actual Rating	Digicall uses a 4-point performance rating scale. The Total Actual Rating refers to your total score out of 4.
Total Norm Rating	The Norm Rating will always be 3, Fully Achieved. This reflects Management's expectation that Employees should at least score a 3 – Fully Achieved on each KPI. In other words, if an Employee scores lower than a 3 they are under-performing; if they score higher than a 3 they are over-performing.
Total Rating	The Total Actual Rating converted to a description on the rating scale.
Percentage of Norm	The percentage of times an Employee has met or exceeded the specified norm (3). In the example below, the employee met the expectation of 3 – Fully Achieved 103% of the time.
Norm Rating Specified	The Percentage of Norm expressed in terms of the rating scale descriptions.
Percentage of Total Score	This is the total score that the employee achieved, expressed as a percentage.

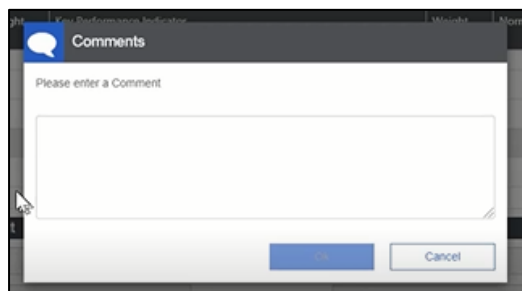
10. If the Employee's scores were calibrated, the new calibrated scores would show in this section. However, your Manager will give you feedback on these possible changes before releasing these results, so that you understand why calibration was needed.



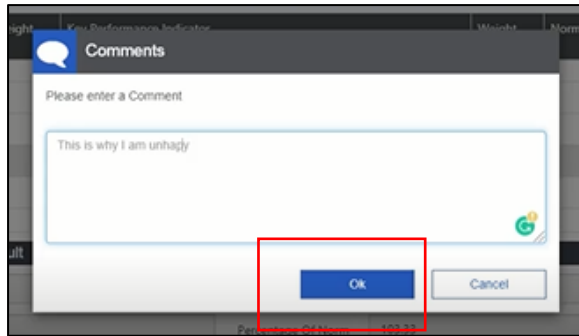
11. After you have reviewed your results, you can now acknowledge your performance review results. In acknowledging your results, you have two options: *Acknowledge & Agree* OR *Acknowledge & Dispute*.



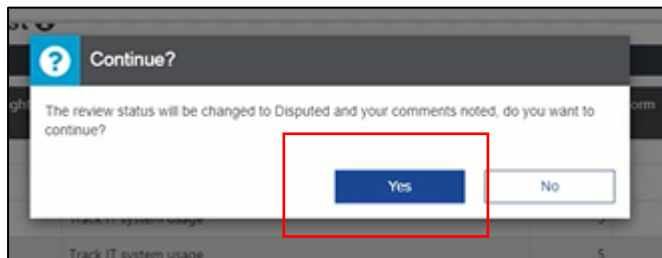
Note: If you choose to *Acknowledge & Dispute*, you will be prompted to give a reason for your dispute.



Enter your comments and click on OK to submit.



12. You will receive the following popup. Click on Yes to confirm the submission of your acknowledgement.



13. The status of your review results will now be changed to *Disputed* or *Acknowledged* depending on the option you chose in acknowledging the results. These review results will always remain in your inbox for your own records. You will always be able to access the ratings and comments for this review.

Review Name	Contract Name	Cycle Start	Cycle End	Review Status
TEST	FarmSol Standard Performance Template	1 Jan 2020	31 Jan 2020	Disputed
Jan Test Review	Training Contract	1 Jan 2020	31 Jan 2020	Disputed
Feb Performance Review	FarmSol Standard Performance Template	1 Feb 2020	29 Feb 2020	Disputed

Thank you for completing the Digicall Performance Management process!