User Guide

ePerformance – Template 1
Manager/Supervisor Evaluation
General Staff Performance Review

Brief Document Description

Overview

ePerformance has been created to streamline the performance review business process. It provides managers/supervisors and OHRM with better reporting and tracking capability.

This User Guide explains how a Manager/Supervisor can initiate and complete an ePerformance review using Template 1.

About this Business Process

This ePerformance process has been developed to replace the previous paper based forms for annual performance reviews.

Preparing for an annual performance review

- Initiate online performance review for staff member.
- Review performance notes that have been created during the Performance Review period.

Guidelines for using ePerformance

The following guidelines have been developed for managers/supervisors when using the ePerformance system to undertake an annual performance review for employees reporting to them.

Logging into ePerformance

Log in via the Staff Portal>My Staff Page>Performance

Session Timeouts

Your session will time out after 240 minutes of inactivity.

Signing out of ePerformance

To sign out, click on the  on the top right hand corner of your screen and select “Sign Out”.

Assistance in using ePerformance

For further assistance in using ePerformance, please contact HR on (07) 3735 4011 and select option #4.

Template 1 Manager/Supervisor Workflow

- Manager/Supervisor initiates online performance review
- Manager/Supervisor reviews the auto populated Position Description in 'Section 10 Attachments' (consults with HR Adviser if Position Description needs to be updated)

- Manager/Supervisor completes and saves Sections 1 – 3 (Print saved document and take to face-to-face meeting

- Manager/Supervisor and employee meet face-to-face to discuss:
  - Previously completed Sections 1 – 3; and
  - Sections 4 (Goals and Objectives) and 5 (Development and Training

- Manager/Supervisor enters outcome from discussion into Sections 4 and 5;
- Manager/Supervisor completes Section 6; and
- Shares online performance review with Employee

- Employee reviews completed Manager/Supervisor's evaluation and:
  - Acknowledges that they have read and understood the University Code of Conduct; and
  - Acknowledges completion of Annual Fire Safety Training and any other Health and Safety training required by their work area

- The employee "Acknowledges" their performance review and includes their comments

- The review is now completed and is accessible via "Historical Documents" for the Manager/Supervisor and Employee

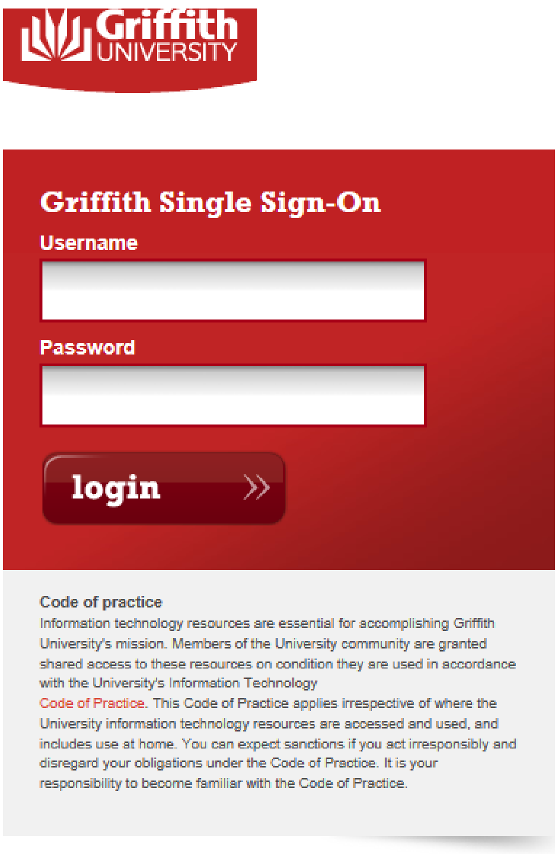
Steps

Step 1	Log in to My Staff Page via the Staff Portal
Step 2	Review performance notes
Step 3	Initiate online performance review
Step 4	a) Complete online performance review b) Face-to-face meeting with Employee c) Employee completes and acknowledges online performance review

Step 1 - Login to the My Staff Page via the Staff Portal

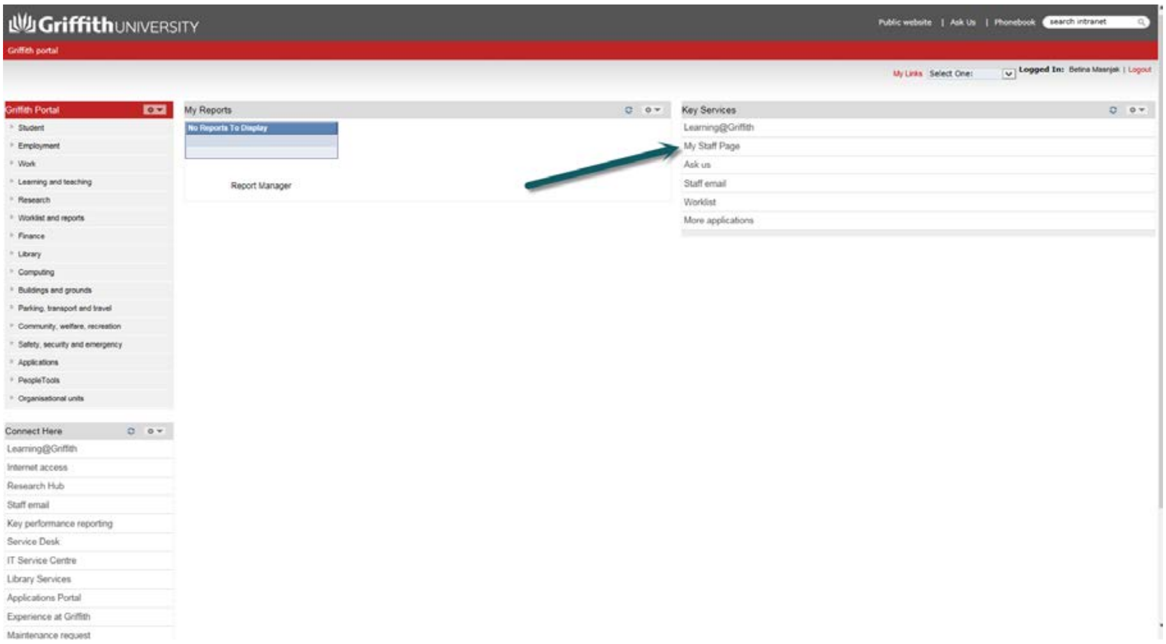
Open the Griffith Home Page. Click on Staff Portal in the top right hand corner of the screen.

Log into the Staff Portal using your Griffith ID and Password.

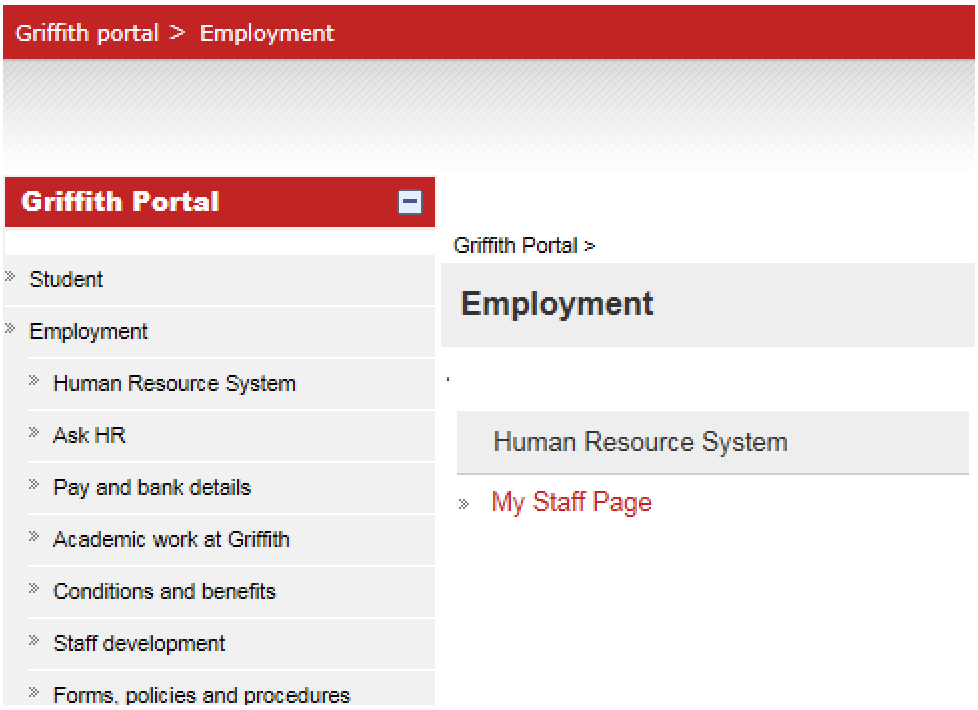


The Staff Portal Page displays. My Staff Page can be accessed in two locations within the Staff Portal.

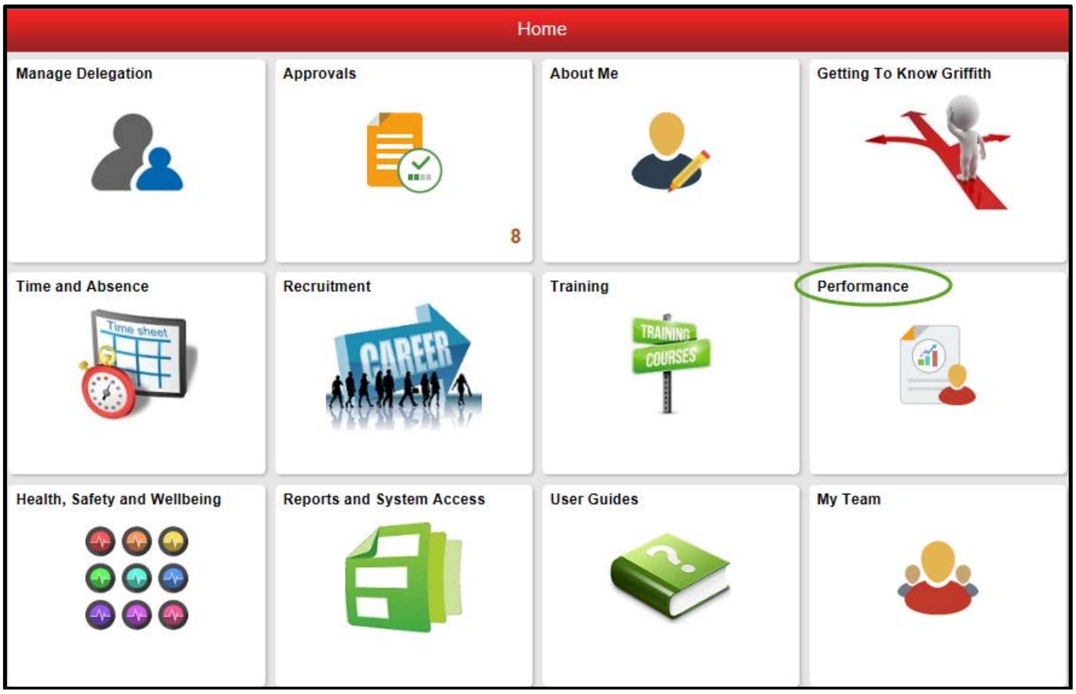
The first location is by clicking on My Staff Page under "Key Services".



Alternatively you can select Employment from the left hand side navigation menu, and click My Staff Page under "Human Resource Management".



After logging into My Staff Page, the “Home Screen” will appear. Select the “Performance” tile.



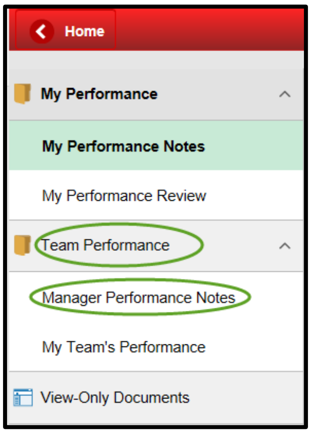
Step 2 – Review performance notes

The layout of the Performance dashboard page has changed. The new page is divided into two sections.

Left hand menu – lists all the menu items under each main heading. The right hand screen – provides functionalities of the menu item chosen on the left hand screen.

If you have created performance notes throughout the year for your staff member, reviewing these prior to completing the annual performance form will assist you in completing the performance review questions.

To review the performance notes select ‘Team Performance’ menu and ‘Manager Performance Notes’ sub menu.



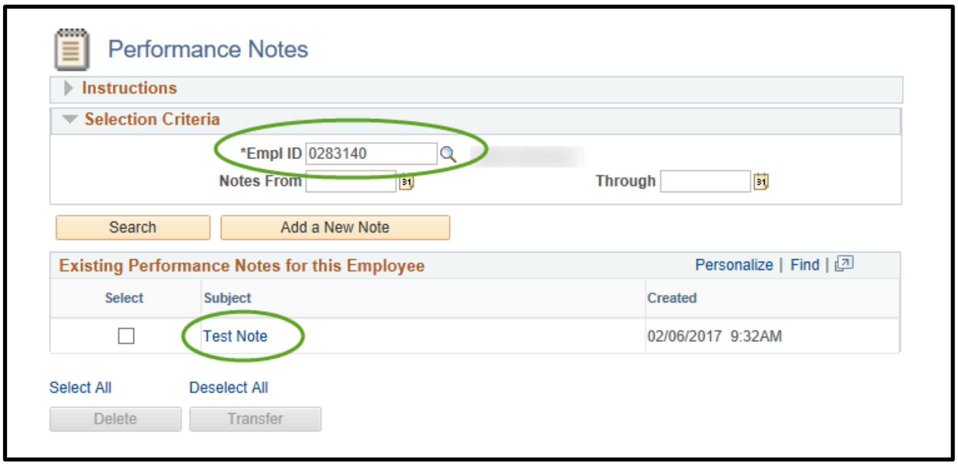
Once the "Performance Notes" screen opens insert the Employee ID.
This does not include the "s" and if the ID is less than seven (7) digits, you will need to insert "0's" at the front of the number to build it into a seven (7) digit number.

Insert the relevant dates. Select "Search".

The existing performance note/s for the employee now appears.

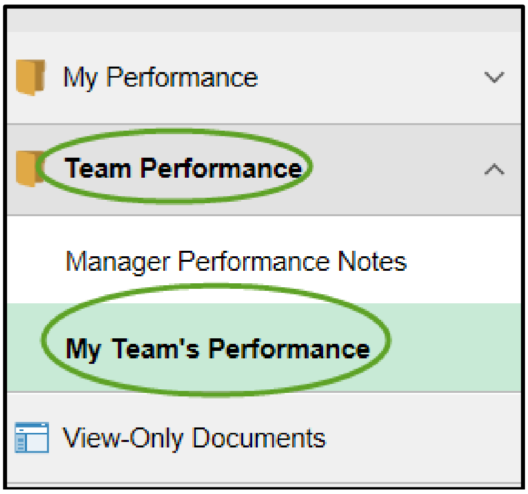
To view the complete performance note, click on "Performance note for Employee" row for the period and found on the subject line.

Performance notes help to remind you of key milestones experienced throughout the year and exist as placeholders to prompt yourself of these activities. The "add a New Note" ability is also found here.

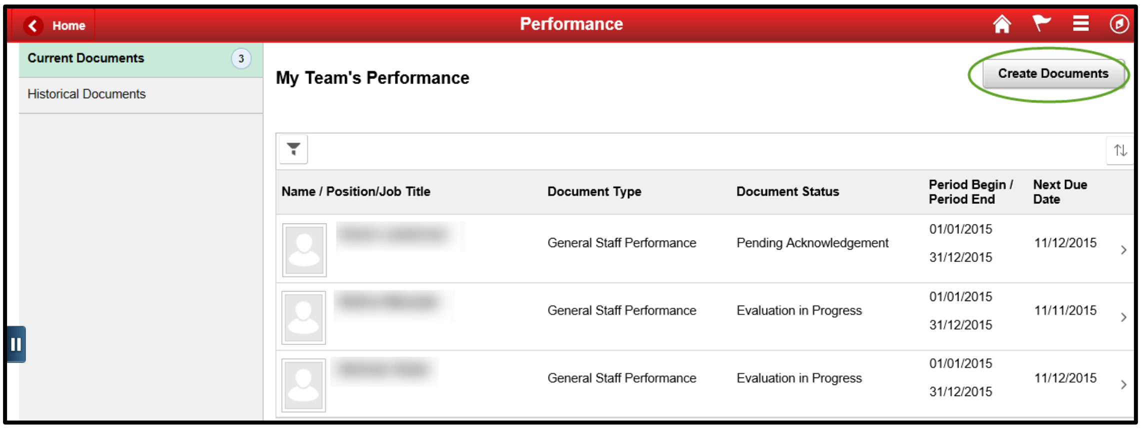


Step 3 – Initiate online performance review

After reviewing the performance notes, select 'Team Performance' menu on the left hand screen, and then select 'My Team's Performance'.



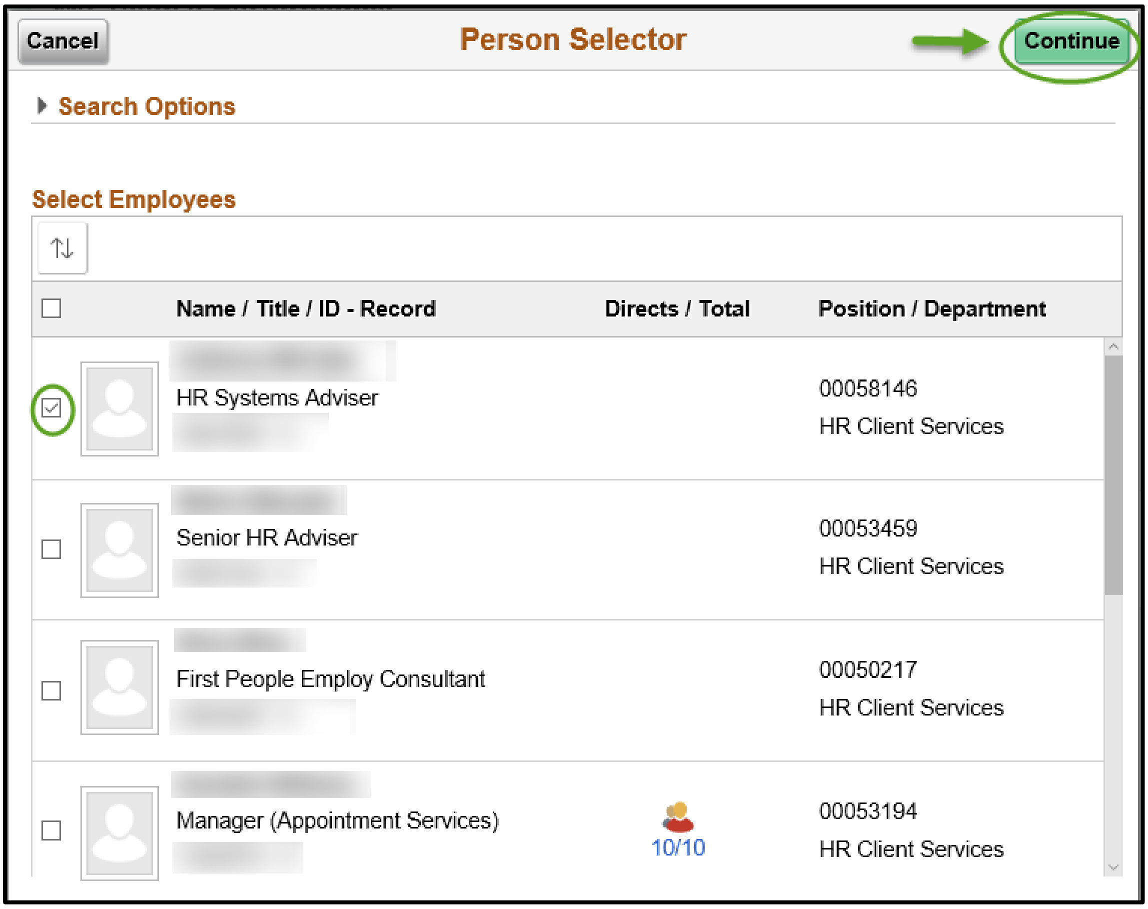
Select "Create Documents".



The 'Person Selector' screen will open.

Select the "Employee" by clicking in the box next to your staff member's photo. This will place a tick within the box denoting this employee as whom you wish to review.

Select "Continue".

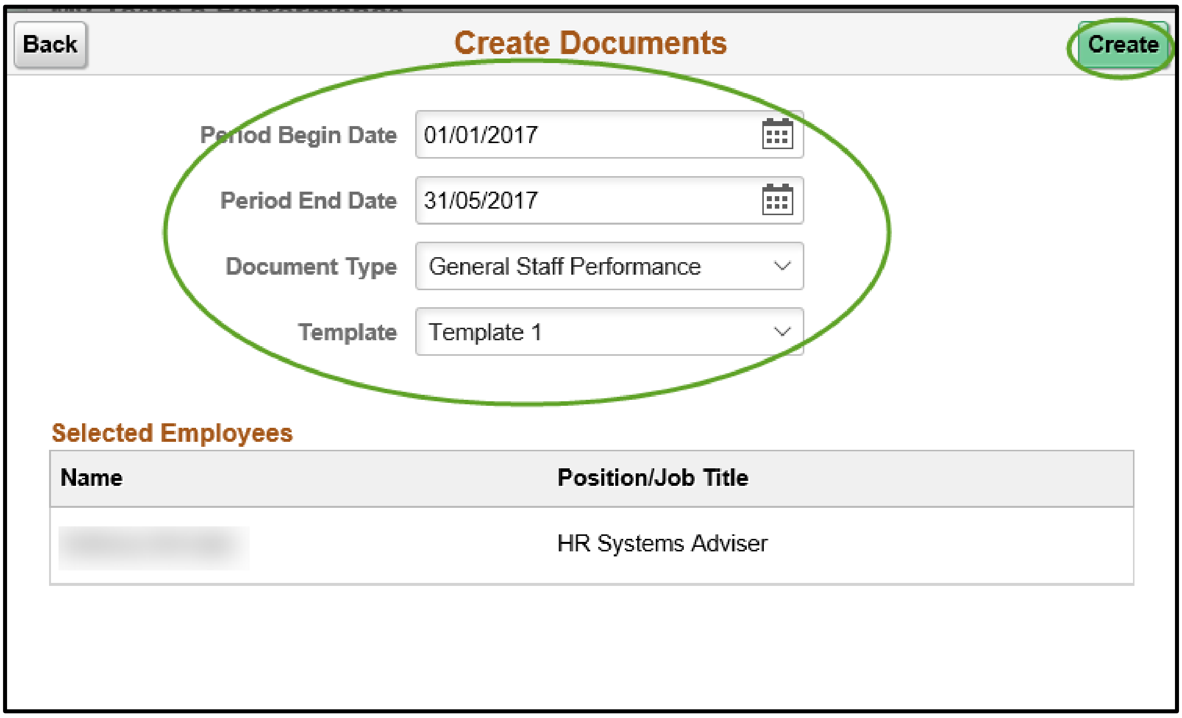


Insert the “Period Begin Date”, “Period End Date” and Document Type.

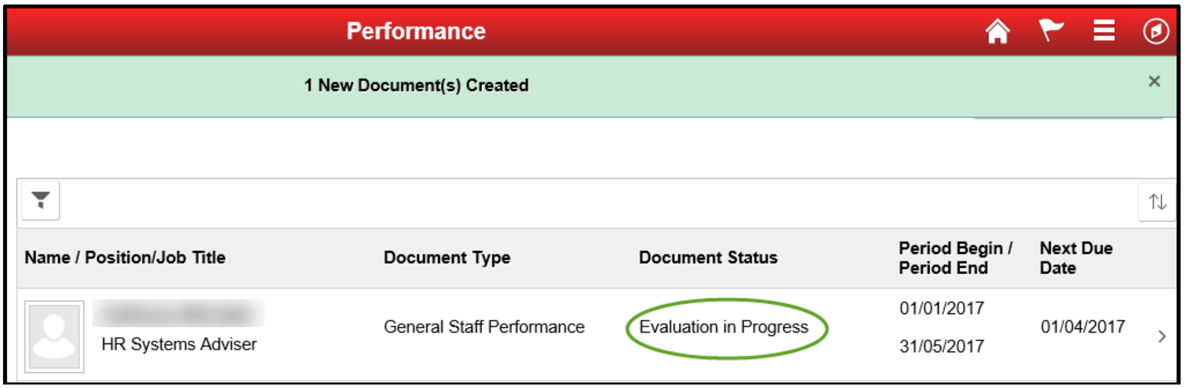
Select “Create”. The “Template” box will now appear.

Select “Template 1”.

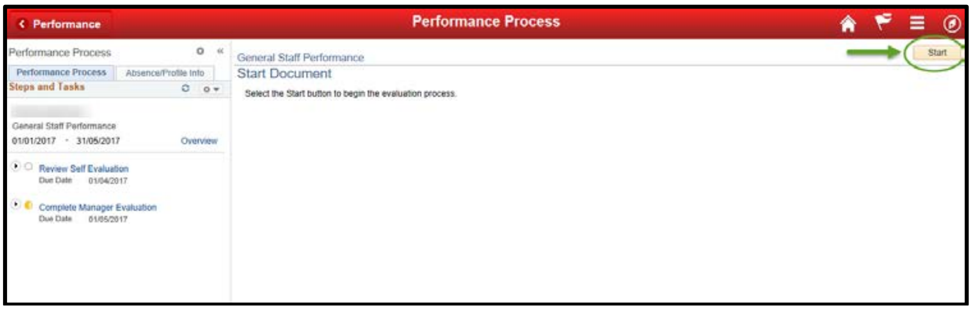
Select ‘Create’ to create the performance review document.



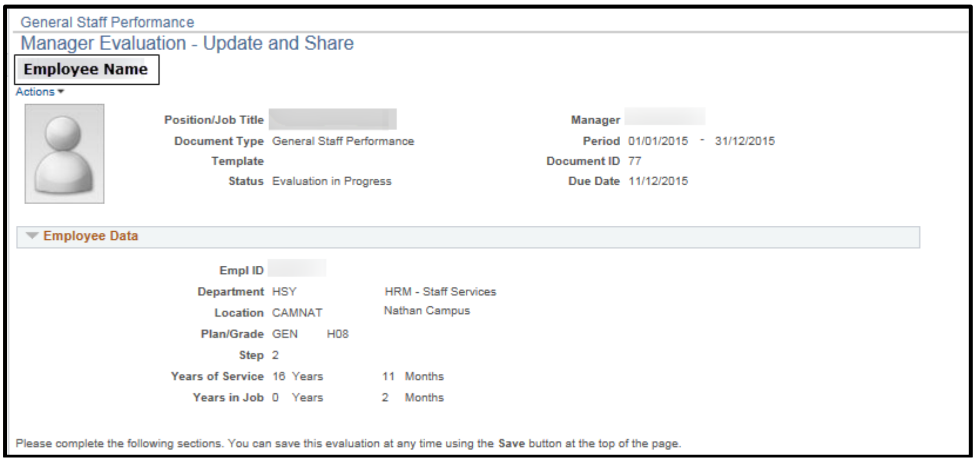
The online performance review will now show as “Evaluation in Progress” and can be opened when double clicking the desired row or selecting the “>” on the screens right hand side for that persons row.



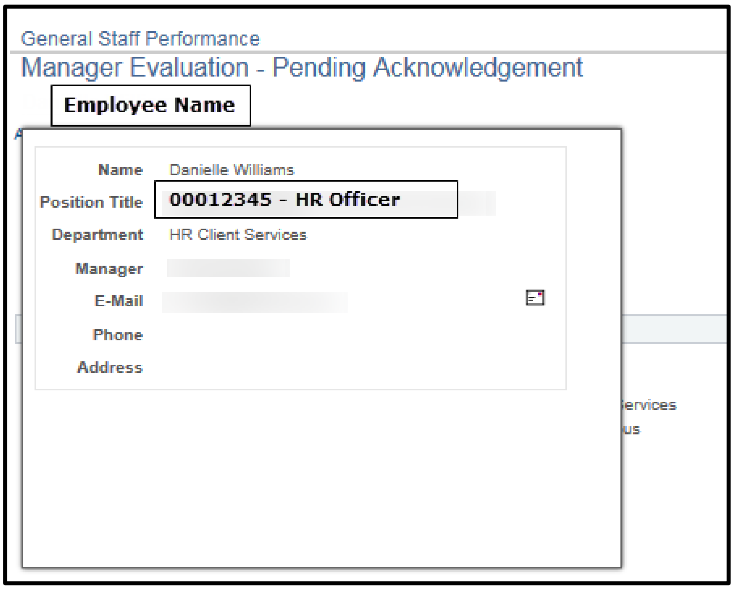
On the Performance Process screen, to start the Manager Evaluation process, select the Start button on the top right hand corner of the page.



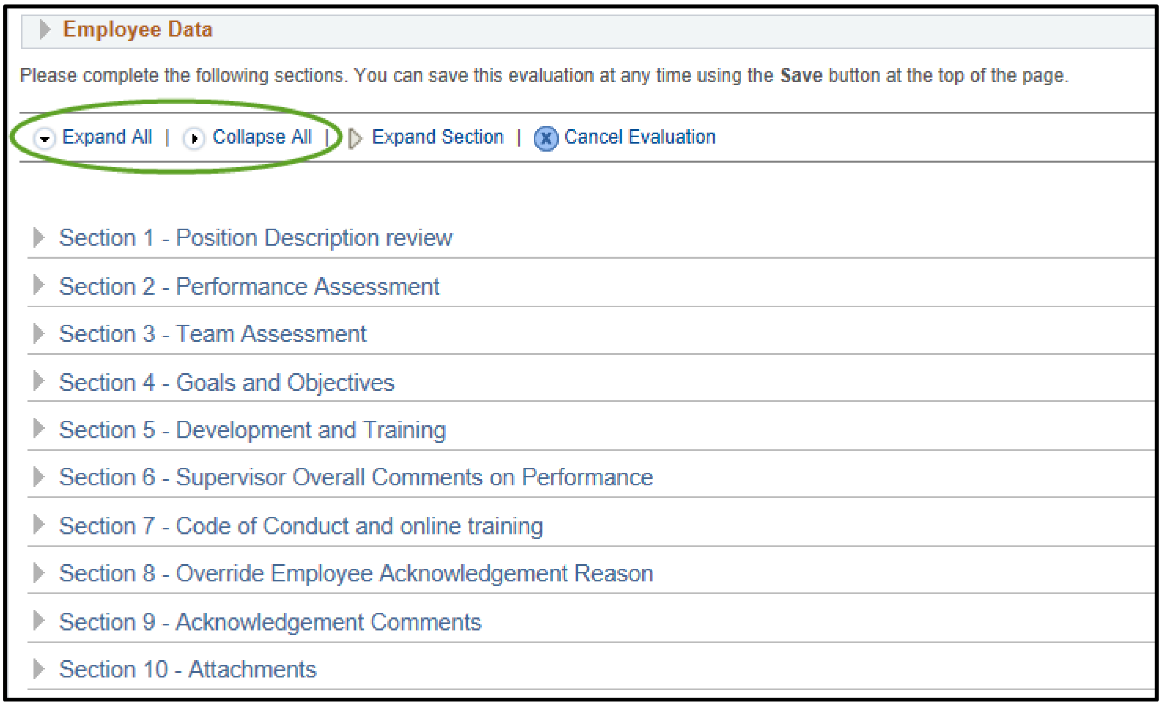
You will be able to view your staff member's position details and employee data.



Hovering over the employee's name will provide you with further information including the Position Number and Position Title that the employee is currently assigned to.



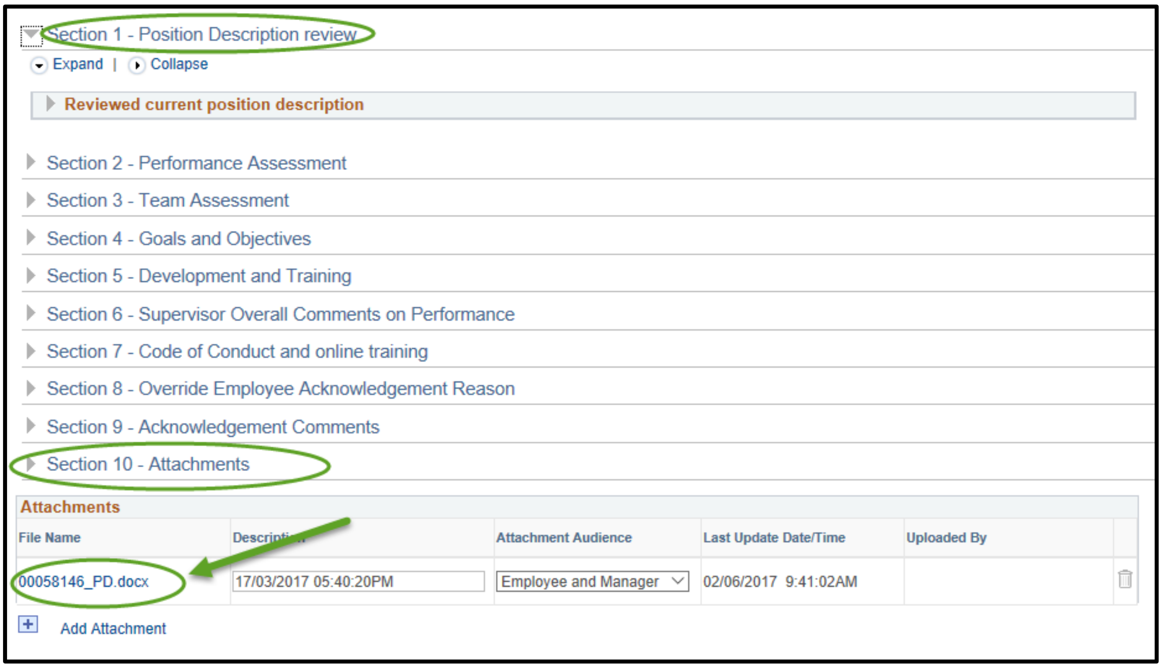
The performance review is divided into 10 sections and each section must be completed. You can expand all sections, collapse all sections or expand each selection separately by clicking on the arrow next to each section name.



Step 4 – Begin online performance review

Section 1 – Position Description review

The system will auto populate the employee's Position Description in 'Section 10 – Attachments' at the bottom of the online form.



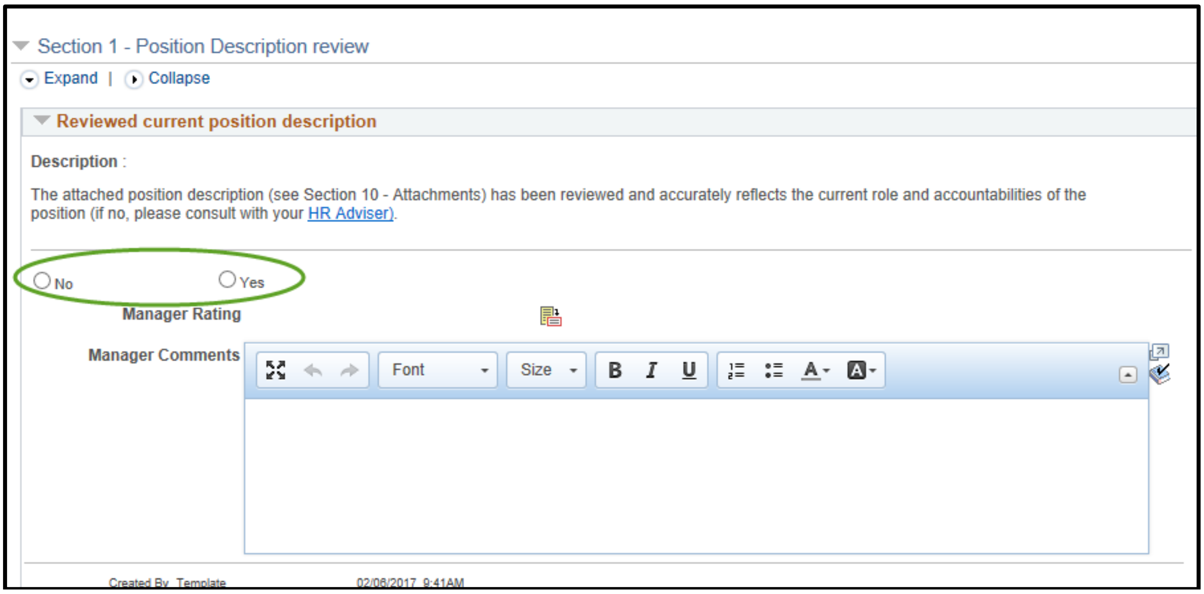
This section asks you to validate whether a “Position Description” has been attached and provide comments if necessary.

This can be validated by reviewing that there is an attachment contained within ‘Section 10 - Attachments’ at the bottom of the online form.

Please review the attachment ensuring it accurately reflects your team member’s role.

If there is a need to provide an updated version, consult with your HR Adviser and upload the updated PD ensuring that the file name includes the <Position Number>_PD.docx (e.g. 1234567_PD)

Answer ‘Yes’ if there is one attached.



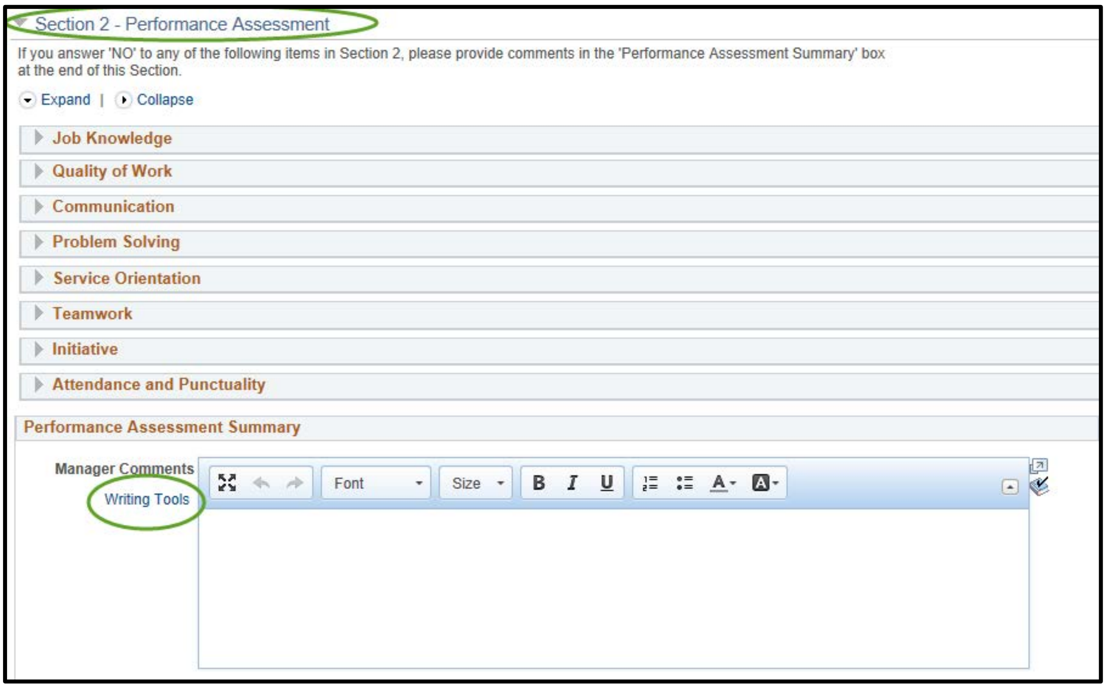
Section 2 – Performance Assessment

As Manager/Supervisor you will be required to answer "No" or "Yes" to each of the assessment items.

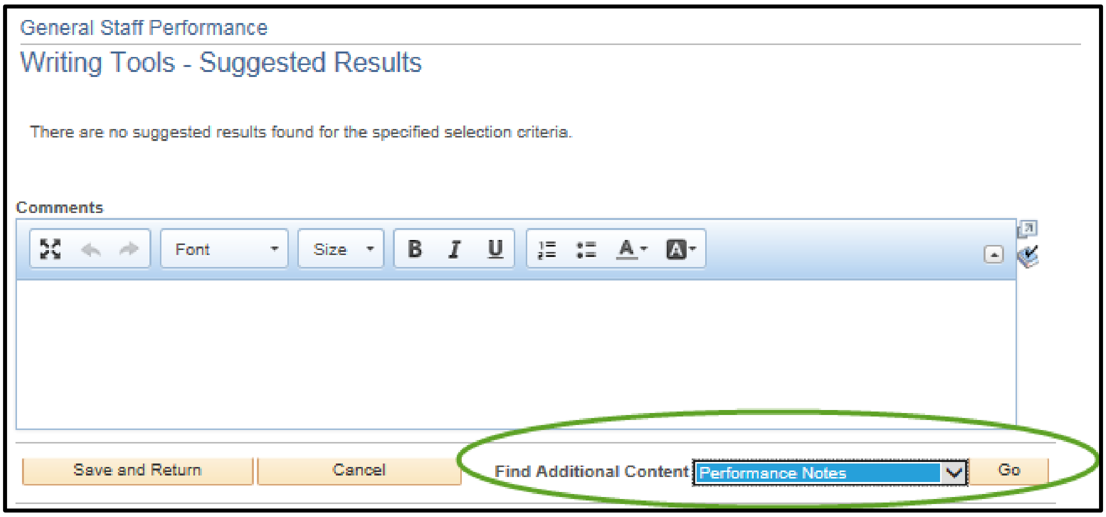
There will be an opportunity to provide a summary at the end of these sections within "Managers Comments".

As part of the "Performance Assessment Summary" you can also select "Writing Tools" and insert performance notes into this field.

In addition you are able to insert free text into each comment box and delete/edit sections of the comment you wish to exclude.



When you click on Writing Tools, from the drop down list next to "Find Additional Content", select "Performance Notes" and then select "Go".



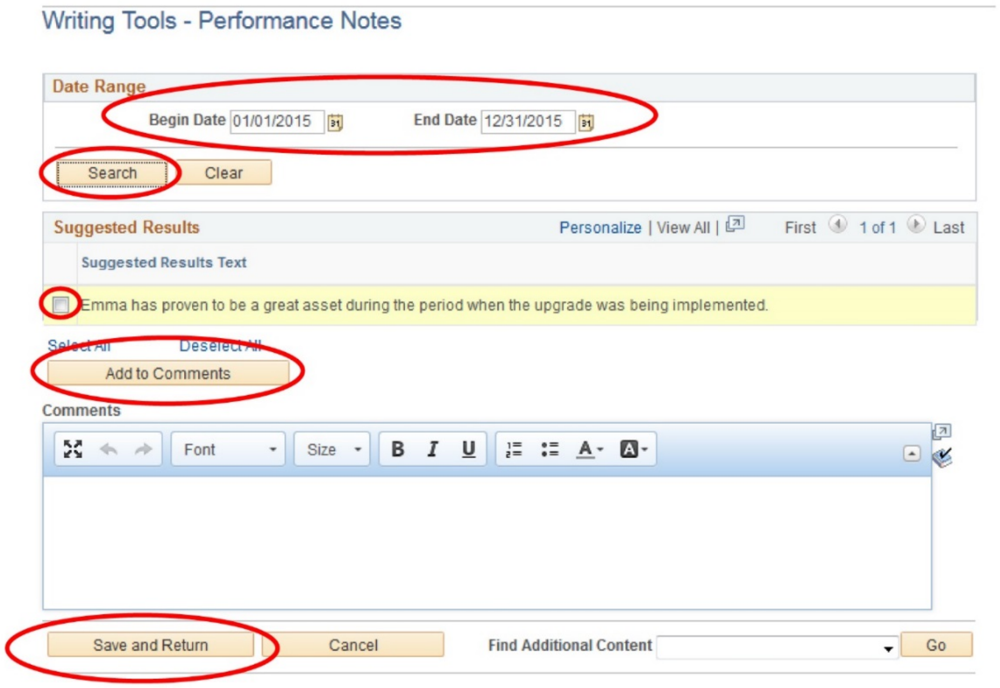
PLEASE NOTE: The ability to insert performance notes into manager comments is available within each section of the online performance review.

Insert the date range and select “Search”.

A list of suggested results will appear.

Tick the required text and select “Add to Comments”.

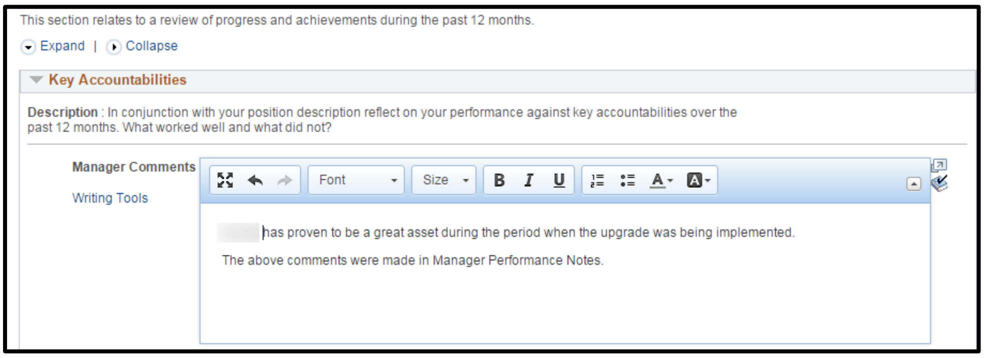
Select “Save and Return”.



The selected ‘Performance Note’ will now appear within the ‘Manager Comments’ field.

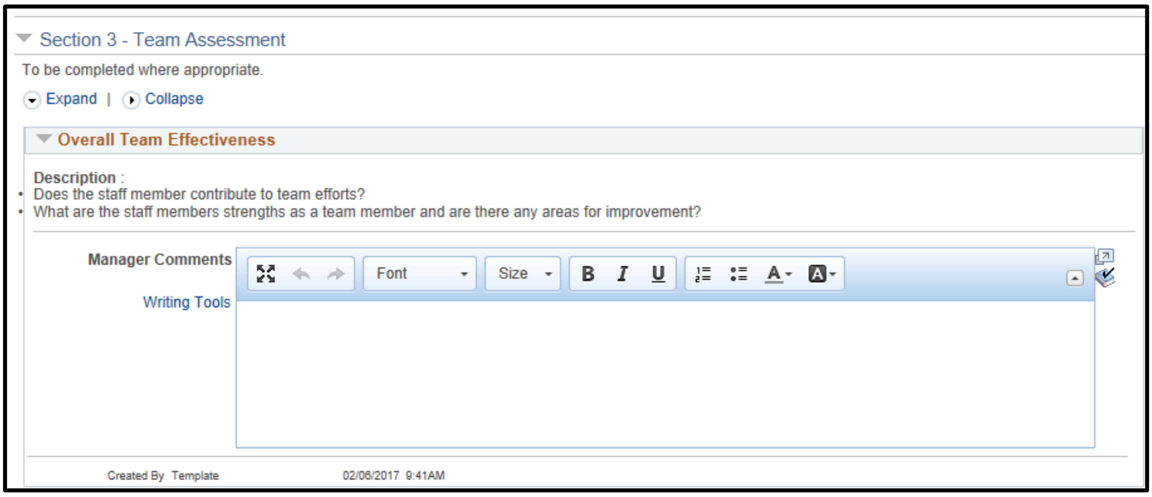
You will also have the ability to insert further free text into each of these comment boxes or edit/delete those comments you wish to exclude.

As per the example below, each box will also include a tool bar allowing for free formatting of the text within these boxes also.

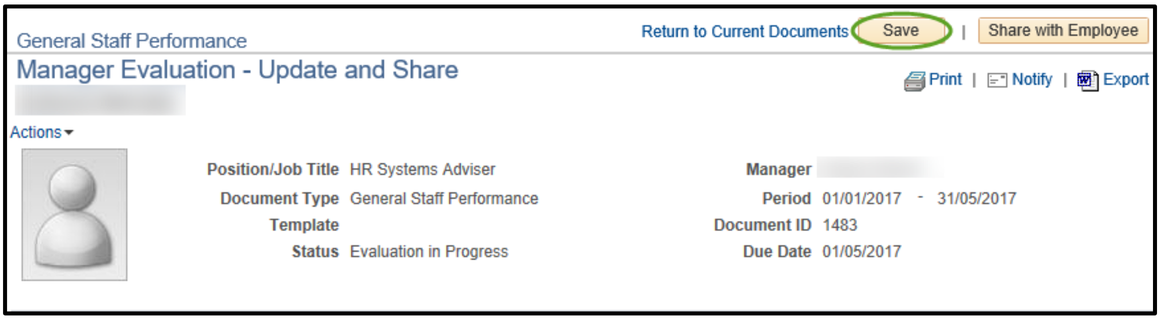


Section 3 – Team Assessment

Again you are able to provide manager comments about your team member's contribution to the overall team effectiveness.



After completion of Section 3 – Team Assessment save the online performance review.



STOP

Face-to-face meeting with Employee

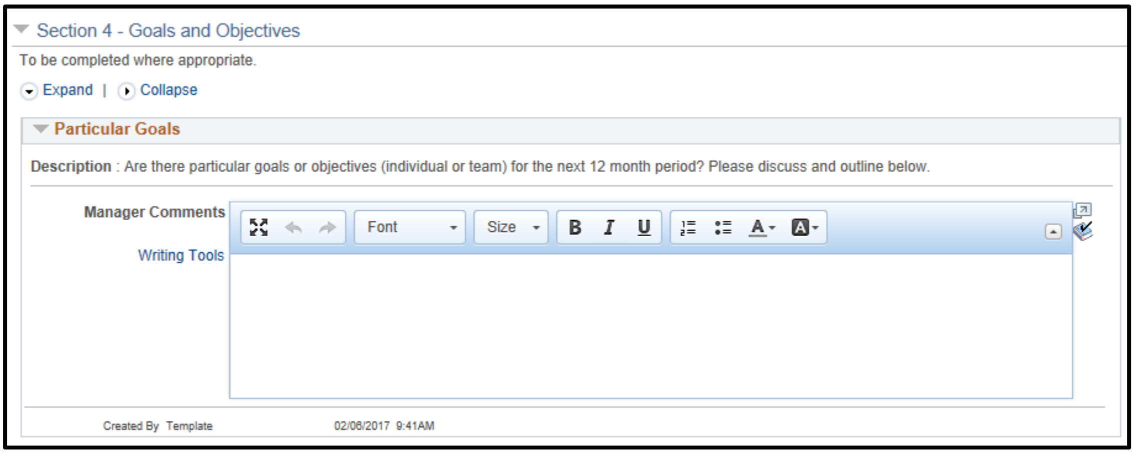
As Manager/Supervisor and upon completion of Sections 1 – 3 of the online performance review, arrange a face-to-face meeting with the employee.

The Manager/Supervisor will be required to discuss the completed sections of the online performance review and Sections 4 and 5.

This discussion can provide input into goals and objectives, together with a needs analysis of any training or developmental activities that are required by and for the employee.

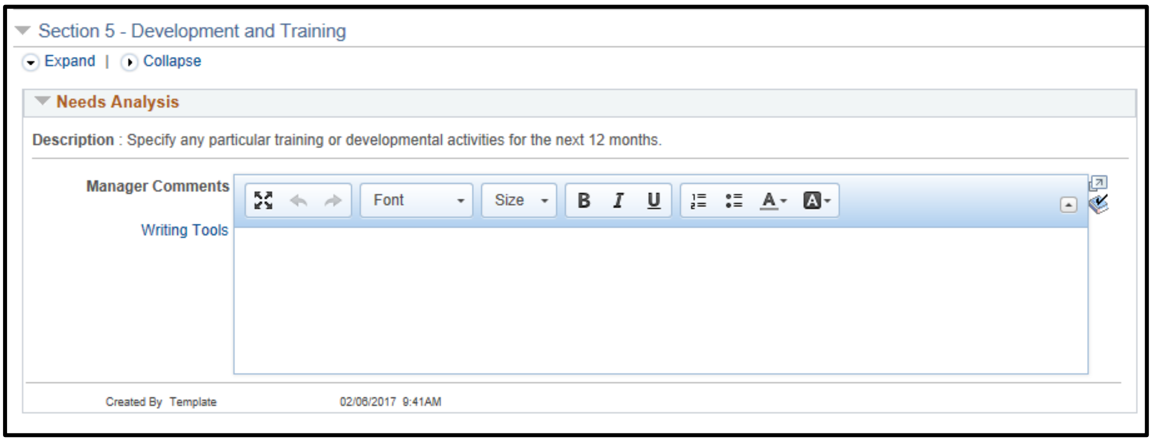
Section 4 – Goals and Objectives

After discussion with your employee you are able to include any comments here regarding goals and objectives.



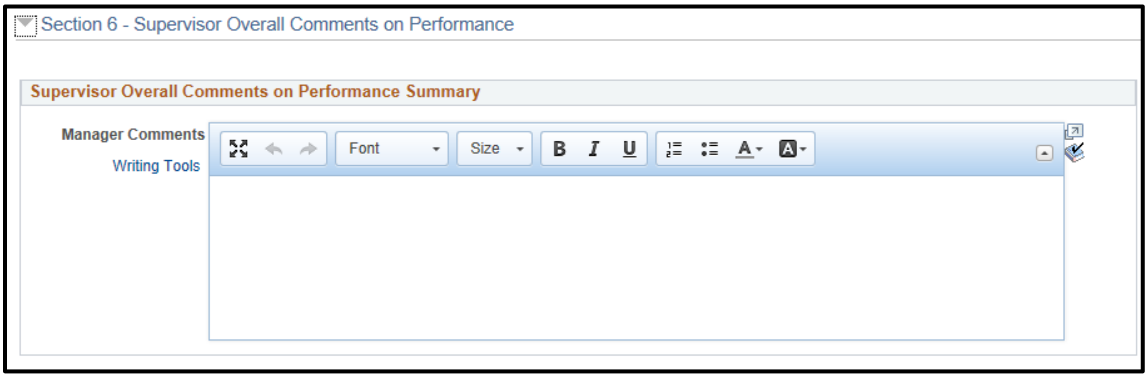
Section 5 – Development and Training

After discussion with your employee you are able to specify any developmental and training activities for the next 12 months.

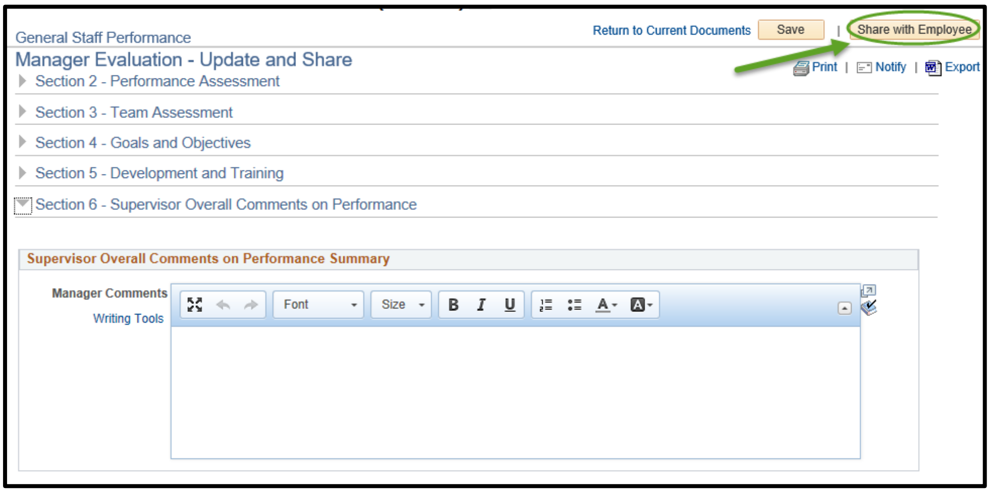


Section 6 – Supervisor Overall Comments on Performance

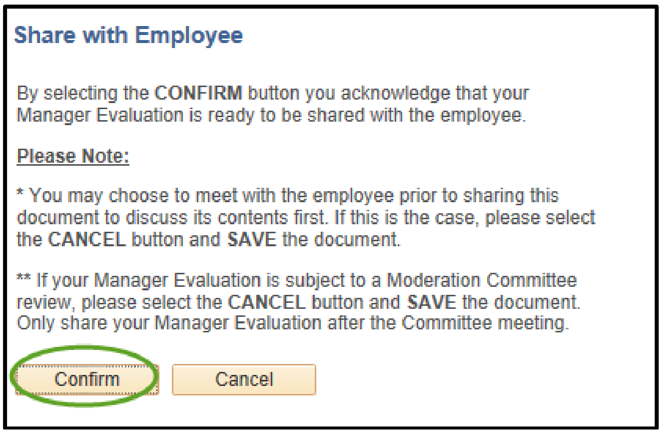
Include your overall comments on your employee's performance for the period the review relates to.



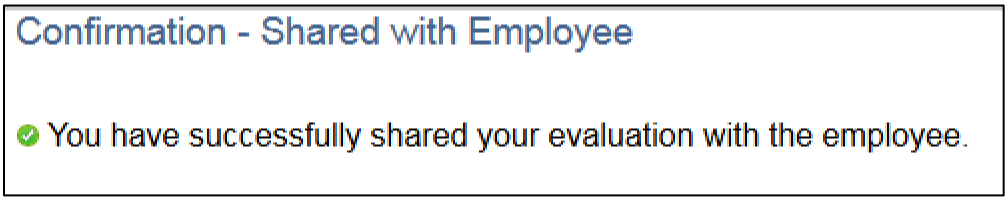
You will now share the online performance review with the employee.



After selecting "Share with Employee" you will be asked to confirm this action.



After selecting "Confirm" the following screen will appear.



Your team member will now be able to access their online performance review through "My Staff Page".

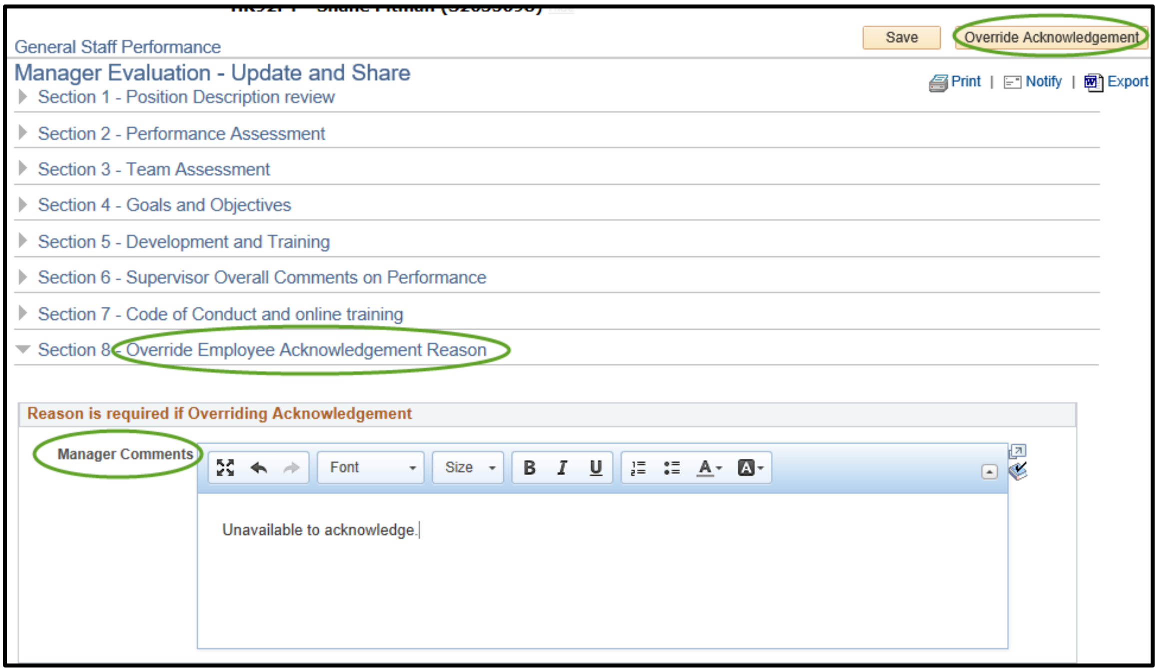
The document status will show as "Pending Acknowledgement".

Guidance on how the employee will complete the components of their online performance review is available in "User Guide: ePerformance – Employee - General Staff Performance Review - Template 1"

Section 8 – Override Employee Acknowledge Reason

You are able to override your employee's acknowledgement only if they are unavailable or have refused to acknowledge their review.

You must provide a reason for the override.



Some of the reasons for overriding an employee's acknowledgement could be that they are on extended sick or Long Service Leave at the time of the review.

If the employee has acknowledged their review, the status of the review will move to "completed" and will appear in "Historical Documents".

Please note: After the employee has acknowledged their review, they will be able to make final comments regarding their review.

To view these documents you will need to open the completed document in 'Historical Documents' under 'Team Performance'.

Further information

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