HRM Appraisal

Employee Evaluation

Employee evaluation page manages evaluation for all employees. Click Evaluation tab in Employee menu, the employee evaluation list page shows as below

image_1666913545646.png
Image not found or type unknown

Add A New Evaluation

To add a new evaluation,

1. Click image_1664824676986.png Add button. Add New Employee Evaluation window opens, image_1663580391250.png
2. Select Employee No. from the drop down list. Once select the employee, employee's details from HRM will be displayed on the screen.
3. Select the Period of Evaluation from the drop down list. Note: The period of evaluation corresponds to the employee's trade (as in above screenshot, selected worker's trade is PIPE FITTER, the period of evaluation will show all available period for PIPE FITTER). If there is no trade configured at the Master Evaluation Factor, then you will not see any dropdown list, the same applies to Employee Type in this Period of Evaluation selection.
4. Click Save. A new evaluation request will be created for selected employee. The add evaluation page will be redirect to evaluation list page.

Add Evaluations in Bulk

To add evaluations in bulk,

1. Click image_1664833503135.png add in bulk button, below window opens, image_1682096102648.png
2. Select employees by ticking the box in front of the employee names. Note: please check the color code in the top right corner of the page for those employees that are not in selection list.
3. Click **Save**. New evaluation requests will be created for selected employees. The add evaluation page will be redirect to evaluation list page.

Employee Evaluation Workflow Types

There are two different workflows in employee evaluations.

Type 1 scenario is: employees do not need to do self appraisal. HR personal or person in charge will create employee evaluation request, employee's supervisor will receive an email notification to remind that he/she needs to do this employee’s evaluation. (employee supervisor is configured as the supervisor field in Official Information page of the employee record in HRM); once supervisor completed evaluation of the employee, supervisor will send the evaluation for director level for final approval. Director will receive an email notification on this employee evaluation for approval. Director will review the all the ratings and comments of the employee and supervisor. Once reviewed, the director will click either Approve or Return the employee evaluation.

Type 2 scenario is: employees need to do self appraisal. HR personal or person in charge will create employee evaluation request. Employee will receive an email notification when his/her employee evaluation was created in the system. Employee needs to do self appraisal and then send to supervisor for evaluation. Supervisor will receive an email notification that he/she needs to do this employee’s evaluation. After supervisor complete evaluation, supervisor will send the evaluation for director level for final approval. Director will review the all the ratings and comments of the employee and supervisor. Once reviewed, the director will click either Approve or Return the employee evaluation.

Set Up Signature in System

Signature setup is a one-time configuration. Employee needs to update the signature before send his/her employee evaluation form to the supervisor. Supervisor needs to update his/her signature before the employee evaluation can be sent to director for review and approval. Director needs to update the signature (one time setup) before approving the employee evaluation.

1. Click userid to expand user setup options. The signature setup is located at "My Profile" image-1667016958065.png

   page screen see below,Image not found or type unknown
2. Click My Profile to open the user profile page as below,
   image-1667017103627.png

   Image not found or type unknown
3. In the My Profile screen, click on the **Change** button. To update signature as per below screenshot. User can sign on the blank space or click upload signature button to upload a signature image file and click Save button. Once sign/upload and save, this signature will appear on the employee evaluation form.
   image-1667017215221.png

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Note: below are icon definition used in evaluation.

image-1666937795816.png

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Type 1 Employee Self Appraisal Not Required

For each Evaluation Factor in HRM master, If Image not found or type unknown flag in Part I of the

Evaluation Factor is set to **NO** and the employee evaluation is created with this evaluation factor, then the employee is not required to do self appraisal.

Below are the workflow steps for type 1scenario:

Supervisor Level

1. Once a new employee evaluation request is created, the supervisor will receive an email notification to remind that he/she needs to do this employee’s evaluation. Click on the URL i.e. https://xxx will open the employee’s evaluation form for the supervisor to do evaluation.
   image-1666987101080.png

   Image not found or type unknown
2. Supervisor need to click the key of each new evaluation request (with status being "New Request").
3. The evaluation detail page opens as below,
   image-1666987447008.png

   Image not found or type unknown
   image-1666988185137.png

   Image not found or type unknown
   image-1666988202765.png

   Image not found or type unknown
   image-1666988217201.png

   Image not found or type unknown
4. Supervisor needs to enter the rating at the Manager Rating column for each evaluation item. System will indicate a red mark at the Remarks column if the lowest rating of 1 or

highest rating of 4 is entered and it is mandatory for the supervisor to enter remarks for this low or high rating. If there is no input for the mandatory remarks, the Save button is disabled.
image-1666988576029.png

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image-1666988595266.png

Image not found or type unknown

5. Click the **Save** button once rating for all evaluation items is updated.
6. If recommendation is required for this employee then the supervisor needs to input the below items. If the recommendation is approved by the final approver, it will appear as a image-166698824

new record in the HRM Pay Eligibility page of the selected employee record.:Image not found or type

- **Effective Date**-enter the effective date of this recommended change
- **Designation**-select from the dropdown list if the designation of employee needs to be changed image-1666990294498.png
- **Salary**-enter proposed new salary amount

- Click onImage not found or type unknown icon to add any allowance for the employee.

  Select the allowance type from the dropdown list and enter allowance amount.
  image-1666990347088.png

  Image not found or type unknown

7. At this Supervisor's Comments and Recommendations section, the supervisor is required to select one of the options in the dropdown list and key in comments.
   image-1666991429980.png

   Image not found or type unknown image-1666991829897.png

8. Supervisor will click onImage not found or type unknown icon to send for final approval of the employee evaluation and click Confirm button. System will auto populate the Assignee and Notify

Users fields if these users are given the director’s permission on employee evaluation.
image-1666991929919.png

Image not found or type unknown

9. Status of this employee evaluation will be changed to **"Sent to Director"** in the Employee Evaluation list page.

Director Level

1. Director will receive an email notification on this employee evaluation for approval
image-1667017375252.png

Image not found or type unknown
2. The director can click on the url i.e. https://xxxx to access the employee evaluation. Below is the employee evaluation for his comments and approval,
image-1667017629003.png

Image not found or type unknown
3. Director will review the supervisor’s ratings, comments and recommendations and he is required to input his comments and recommendations in the below section. Once done, the Save button will be enabled.
image-1667017740536.png

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Type 2 Employee Self Appraisal is Required

image-1667018074674.png

For each Evaluation Factor, If Image not found or type unknown at Part I of the Evaluation Factor is set to **YES** and the employee evaluation is created with this evaluation factor, then the employee is required to do self appraisal first.
Below are the workflow steps for type 2 scenario:

Employee Level

1. Employee will receive an email notification when his/her employee evaluation was created in the system.
image-1667018315324.png

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2. In the email notification, employee needs to click on the url i.e. https://xxx to open his/her evaluation form to do evaluation. Below shows the evaluation form for employee to view and self appraise:

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image-1667018400417.png

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image-1667018417806.png

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image-1667018438440.png

Image not found or type unknown
image-1667018471151.png

Image not found or type unknown

3. Employee is required to enter the rating at the Self Rating column for each evaluation item. Employee is required to input remarks/comments so that the Save button is enabled to allow to proceed to save and send to supervisor for evaluation.

image-1667019390521.png

4. Once employee click Image not found or type unknown send to supervisor icon, system will auto

   populate the Assignee and Notify Users fields and click Confirm button to send.

   image-1667018904386.png

   Image not found or type unknown
5. This employee evaluation status will change from "New Request" to "Submitted" in the Employee Evaluation list page.

Supervisor Level

1. Supervisor will receive an email notification that he/she needs to do this employee's evaluation. Click on the url i.e. https://xxx will open the employee's evaluation form for the supervisor to do evaluation.

image-1667019482031.png

Image not found or type unknown

2. Supervisor is required to enter the rating at the Manager Rating column for each evaluation item. System will indicate a red mark at the Remarks column if the lowest rating of 1 or highest rating of 5 is entered and it is mandatory for the supervisor to enter remarks for this low or high rating. If there is no input for the mandatory remarks then the Save button is disabled. The Red indicator disappears after supervisor inputs remarks.

image-1666991829897.png

3. Supervisor will click on Image not found or type unknown icon for final approval of the employee evaluation and click Confirm button. System will auto populate the Assignee and Notify Users fields if these users are given the director's permission on employee evaluation.
image-1666991929919.png

Image not found or type unknown

4. Status of this employee evaluation will be changed to "Sent to Director" in the Employee Evaluation list page.

Director Level

1. Director will receive an email notification on this employee evaluation for approval
image-1667017375252.png

Image not found or type unknown

2. The director can click on the url i.e. https://xxxx to access the employee evaluation. Below is the employee evaluation for his comments and approval,
image-1667017629003.png

Image not found or type unknown

3. Director will review the supervisor's ratings, comments and recommendations and he is required to input his comments and recommendations in the below section. Once done, the Save button will be enabled.

Revision #12
Created 25 October 2022 09:47:42 by Jnaveen
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