



E-Appraisal System

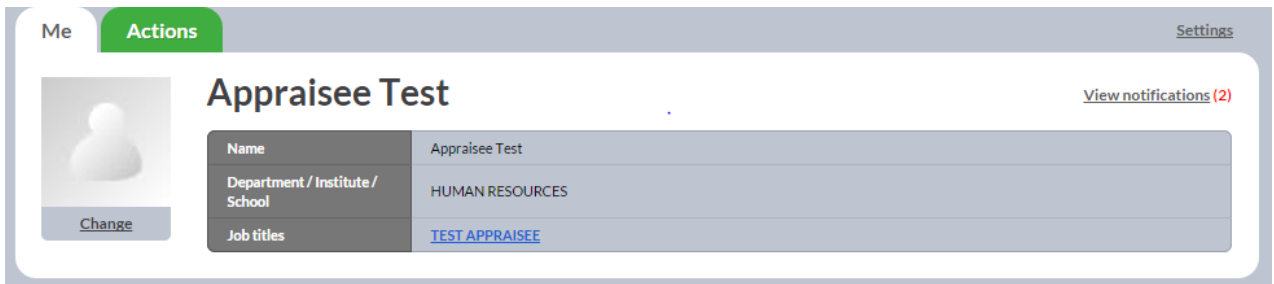
Appraisal System Guidelines

Table of Contents

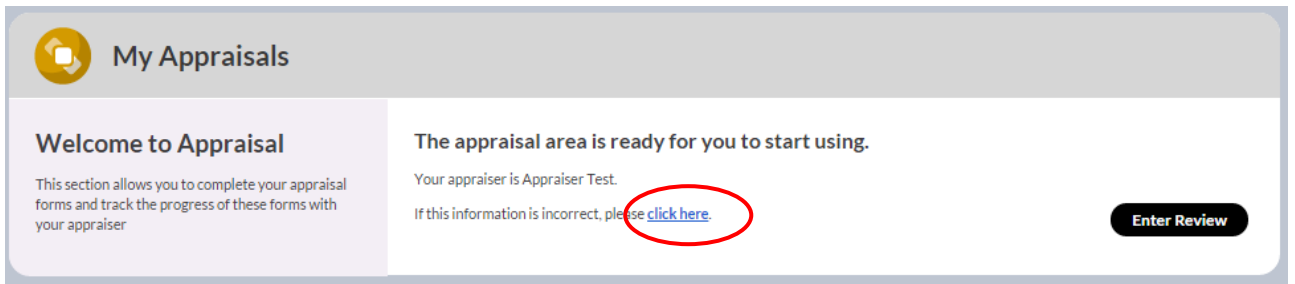
1	Completing the Appraisal Form	2
2	Share and close the Form	8
3	Finalising the Appraisal Form	8
4	Print Friendly PDF	9
5	Add Attachments	9
6	Notes	10
7	Appraiser Process – My Team	12

1 New to the system

Once logged in to e-Appraisal system you will be navigated to the 'Me' tab.

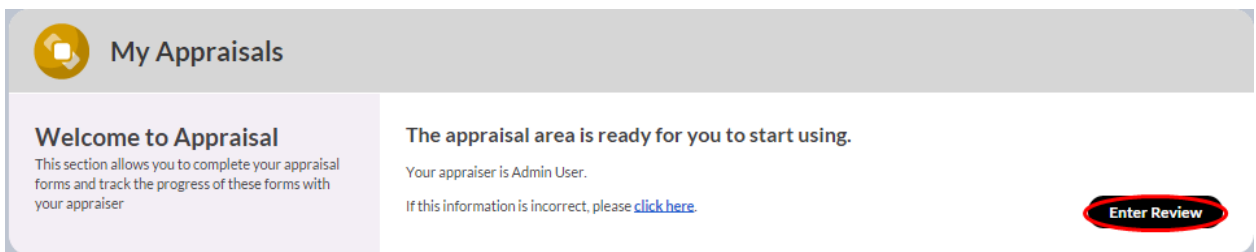


If you are new to the system, go to the My Appraisals section at the bottom of the page to view who your appraiser is. If it is incorrect please click the "click here" link.



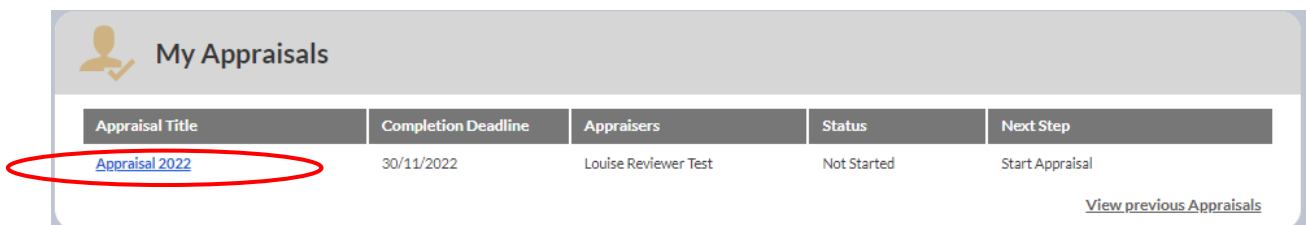
This will open up a Support window and you can update the box accordingly with the correct details. Once complete please click the "Submit" button and an email will be sent to the HR Systems Team.





Assuming the details are correct, please click on the "Enter Review" button to generate the Appraisal Form.



The screen will change to the following format. Click on the Appraisal Form link.

If you have used the system previously you will be taken straight to the Appraisal form options as below.



Include previously agreed objectives and other significant pieces of work carried out	Link to strategy	Reflections and summary
Appraiser to complete  0 words	Appraiser to complete   0 words	Appraiser to complete  0 words

Add

Appraiser summary View History
Appraiser(s) to complete 0 words



This section is for reviewing objectives. If you finalised your last appraisal, some sections will be pre-populated.

*** Please note if your previous year’s appraisal form was archived you will need to copy and paste the looking ahead data into your looking back section on your current form.

Looking forward

This section is for setting this year’s objectives.

Appraiser proposed objectives for discussion

Record as much information as needed to make the outcome clear	Link to strategy
Appraiser to complete  0 words	Appraiser to complete   0 words

Add

Appraiser summary View History
Appraiser to complete 0 words

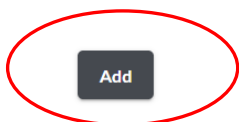
For further help please go to <https://hr.qmul.ac.uk/procedures/appraisal/> for guides on completing your appraisal form.

Enter your Work Objectives and Link to Strategy, Comment and Agreed Summary boxes. The boxes are free text fields.

To add further Work Objectives, please click the “Add objective” under the boxes

Appraisee proposed objectives for discussion

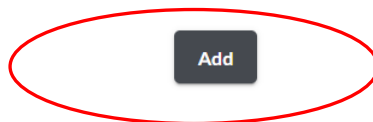
Record as much information as needed to make the outcome clear	Link to strategy
Appraisee to complete 0 words	Appraisee to complete 0 words



“Citizenship” tab

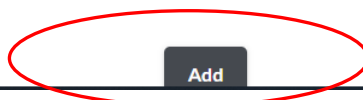
Enter your information in the “Looking back” and “Looking Forward Boxes.

Activity/Behaviour	View History
Appraisee to complete	
Comment (Describe what impact/specific contribution you have had? How can you evidence this?)	View History
Appraisee to complete	



Looking Forward

Activity/Behaviour
Appraisee to complete



To add further Activity/Behaviour, please click the “Add Activity/Behaviour” under the boxes

“Support and Engagement” tab



This section is to agree actions between you and your appraiser.

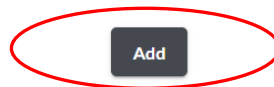
Hyperlinks are provided to help you if required.

“Career and Development” tab

Looking back

Guidance notes can be accessed via the hyperlink


Development Objective	Progress Review
Appraisee to complete  0 words	Appraisee to complete  0 words







To add Objectives, please click the “Add Activity/Behaviour” under the boxes

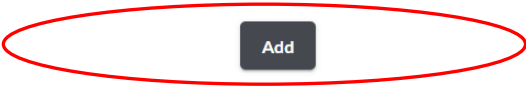
Looking forward

This section is for you and your manager to explore your aspirations, how you’d like to progress in your role, and what you need to do to achieve your objectives.

Career and Personal ambition.  Appraisee to complete 0 words	View History
Any additional suggestions for progression Appraiser(s) to complete 0 words	View History

To add Looking forward development objectives, please click the “Add Looking forward development objectives” under the boxes

Your Development Objective	What development activities would help?	Category^ (Please select from drop down below)
Appraisee to complete  0 words	Appraisee to complete  0 words	Appraisee to complete  



“Summary” tab

The Appraisee box is for Appraisee is only editable by the Appraisee and cannot be edited by the Appraiser. Similarly, the Appraiser box can only be edited by the Appraiser and not the Appraisee.

Appraisee

This section is only editable by the Appraisee. The text will be visible to the Appraiser once the form has been shared.

Consider any common themes across your objectives, feedback you've had, your strength, any learning, what you need to focus on in the coming year. [View History](#)

Appraisee to complete

0 words

Appraiser



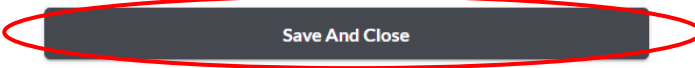
This section is only editable by the Appraiser. The text will be visible to the Appraisee once the form has been shared.

Consider any comments themes across the objectives e.g. strengths, learning, aspects, the appraisee needs to focus on in the coming year. [View History](#)

Appraiser(s) to complete



0 words

To save the form at any time click the “Save” or “Save and Close” icon at the top of the Appraisal form. This will Save the form and you can return to the Me page. This option will save the form in DRAFT format only.

<p> Share</p> <p>You have not yet shared this Appraisal.</p> <p>After answering one question, a button will appear allowing you to share answers with other participants.</p>	<p> Save And Close</p> <p>Your changes won't be shared when leaving the Appraisal.</p> <div style="text-align: center; margin-top: 10px;">  </div>
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2 Share and close the Form

Upon completion of the form click “Share” at the top the page. This will create a notification to your Appraiser and enable them to view all form content.

<p> Share</p> <p>You have not yet shared this Appraisal.</p> <p>After answering one question, a button will appear allowing you to share answers with other participants.</p>	<p> Save And Close</p> <p>Your changes won't be shared when leaving the Appraisal.</p> <p>Save And Close</p>
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3 Finalising the Appraisal Form

Either the Appraisee or the Appraiser can initiate the Finalisation process.

In this example the Appraiser has sent a Finalise action to the Appraisee. If you as the Appraisee agree with the final content you may click the Approve button. Only click Approve if you are in agreement with the final content, as the form will lock from further editing.

<p>Finalisation</p> <p>Once you have ticked this box you will not be able to make any further changes to this review. Other users on this review will be notified that you wish to finalise it.</p> <p>This Appraisal will complete automatically once all parties have submitted for finalisation.</p> <p>View History</p>	<p><input type="checkbox"/> APPRAISEE TEST - I agree to the finalisation of this appraisal</p> <p><input type="checkbox"/> Louise Reviewer Test - I agree to the finalisation of this appraisal</p>
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On finalisation, the appraisal form will move into the finalised appraisal section on the “Me” page.

 My Appraisals					
Appraisal Title	Completion Deadline	Appraisers	Status	Next Step	Actions
No active Appraisals to display.					
View previous Appraisals					

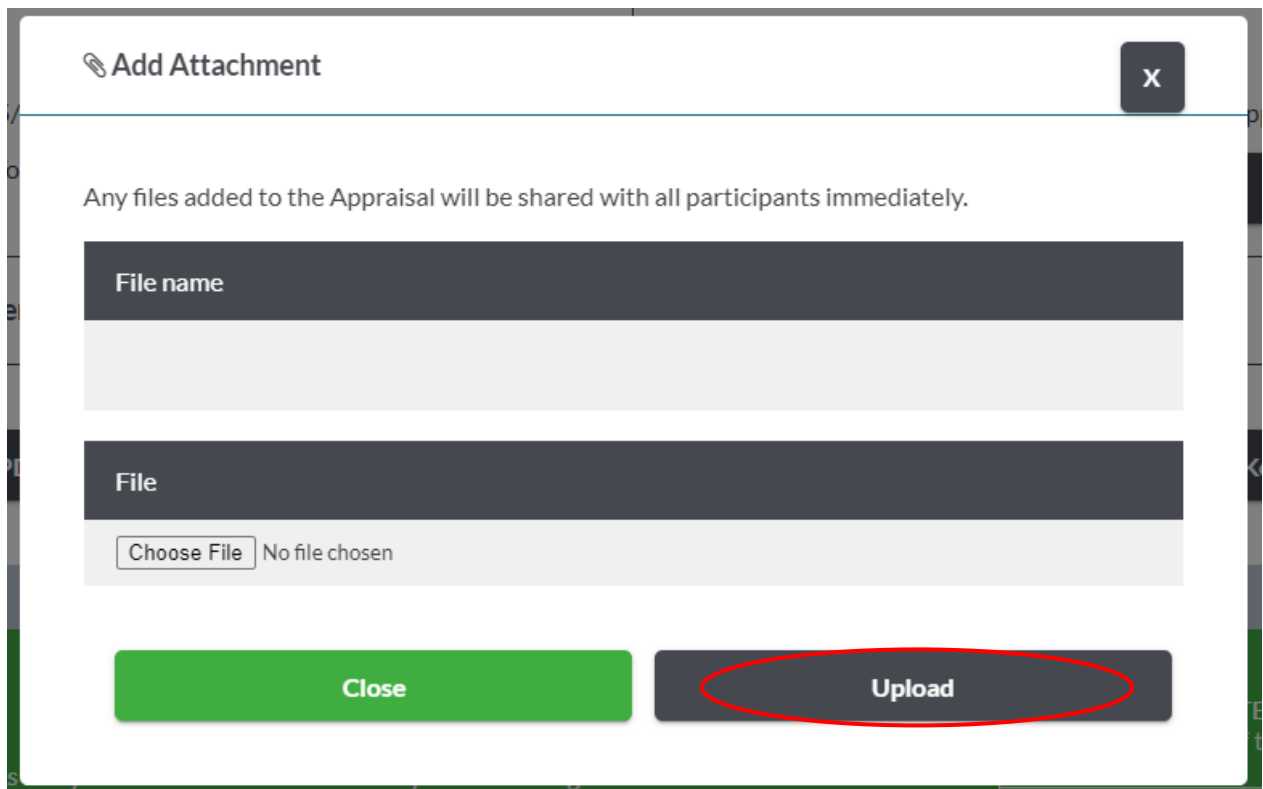
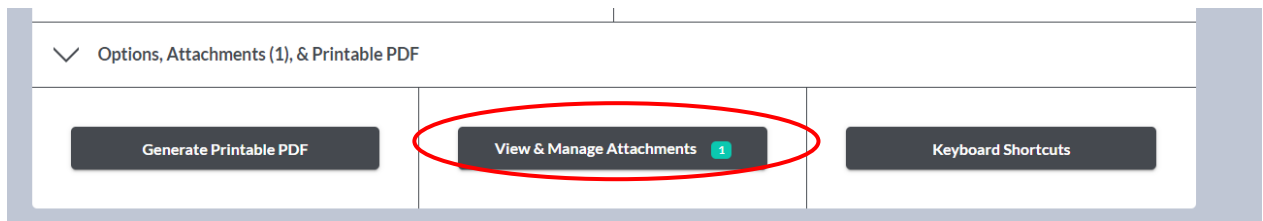
4 Print Friendly PDF

Options, Attachments (1), & Printable PDF		
Generate Printable PDF	View & Manage Attachments 1	Keyboard Shortcuts

5 Add attachment

This will be useful for Appraisers whose staff do not have access to PC's/Laptops.

Click on Add Attachment, then click Choose File to select a file, then click Upload, allow the File to upload.



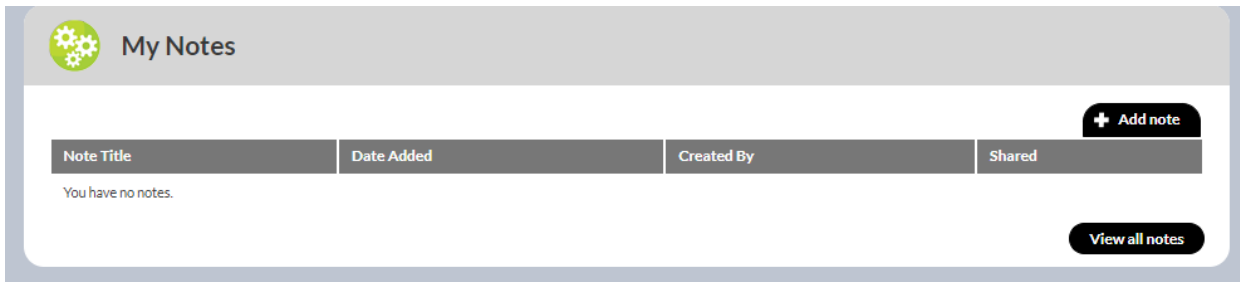
Once the File has Uploaded then click upload to close the screen

From the appraisal form screen the Add Attachment link has changed to the following where you can then click into the View/Edit to see the attachment that you saved.



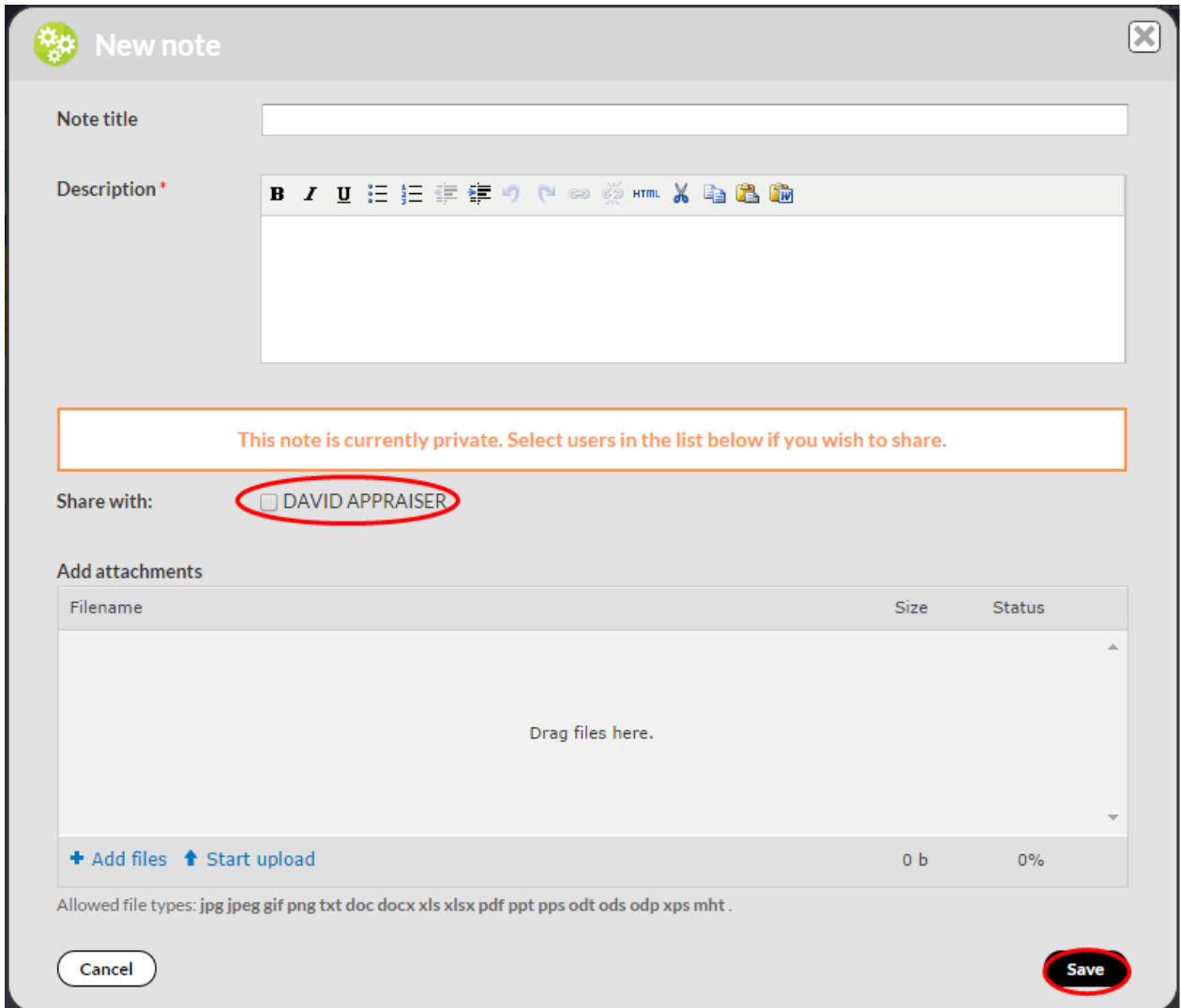
6 Notes

At the bottom of the Me tab, there is a Notes section where you may record feedback relating to your work. My Notes.



Click Create new Note to record your feedback. You can also tick the Share With tick box to share your feedback with your Appraiser.

Click Save when finished



Please note that both the Appraiser and the Appraisee can share notes in this section, both being able to share the note with each other.

Appraiser Process

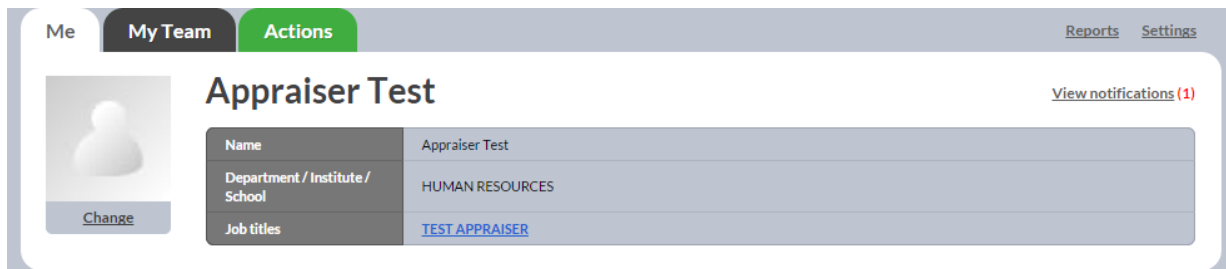
1 My Team

As an Appraiser the screens you access are the same as an Appraisee, with the exception of having an extra Tab on your profile called My Team.

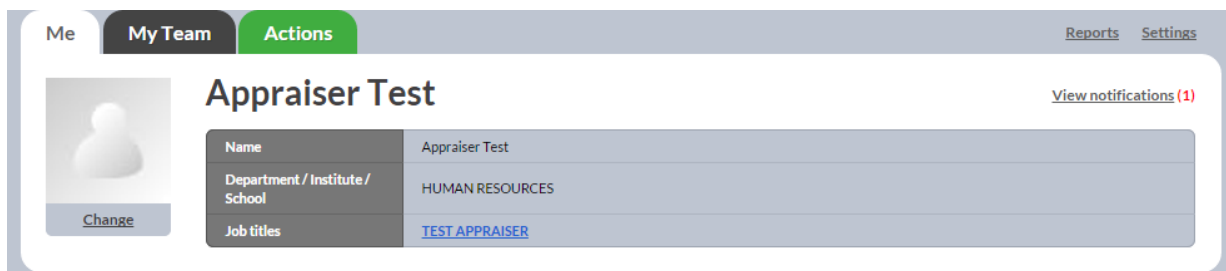
From the My Team tab you can select the Appraisees you are responsible for Appraising.

When an Appraisee updates their Appraisal Form you will receive Actions and/or Notifications from them. These Actions will be displayed on the Me tab or on the Appraisal Form itself.

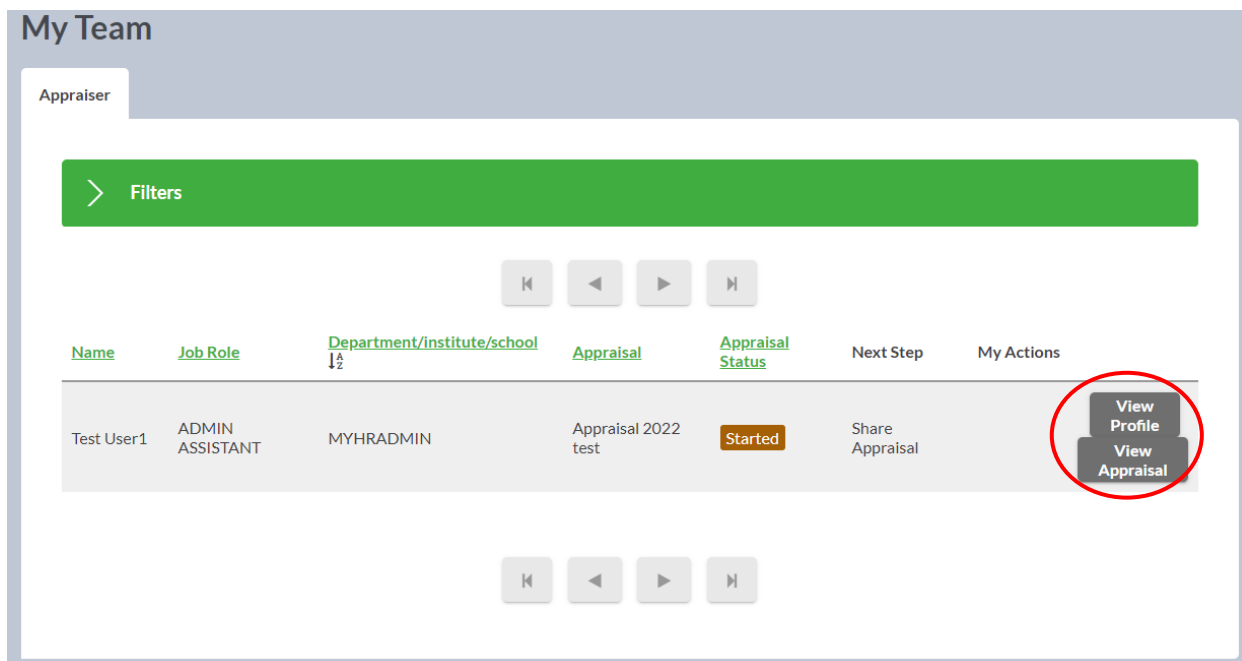
You can also click on the Action tab in green or you can go to the My Team tab and select the Appraisee from there to view the Appraisal Form.




To view an Appraisal Form for your Appraisee click on the My Team tab.



Then select an Appraisee, you can view their appraisal form or their profile.




The available Appraisal Forms will be displayed in the Appraisals section, please click on the relevant Appraisal Period

 **Appraisee Test's Appraisals**

Appraisee Test's Appraisals

Review Title	Appraiser(s)	Action
Appraisal 2015	Appraiser Test	Awaiting appraisee for finalisation

Appraisee Test's Notes

 Use your notes area to record 1 to 1s and feedback relating to your work. You can refer to this in any of your appraisals.
[View Appraisee Test's notes](#)

[View finalised appraisals](#)

Once the Appraisee has updated the content of the Appraisal Form and clicked Share and Close, the Appraiser will receive a Notification requesting the Appraiser view the form. You will now be able to add content and then Share and Close to enable the Appraisee to view the content you have updated.

Once the Appraisee and the Appraiser have shared and closed the form, this back and forward process may continue until such time that both parties will agree on the final content. Once agreed the content of the Appraisal Form can be Finalised, click the Finalise option

Finalisation

Once you have ticked this box you will not be able to make any further changes to this review. Other users on this review will be notified that you wish to finalise it.

This Appraisal will complete automatically once all parties have submitted for finalisation.

[View History](#)

<input type="checkbox"/>	APPRaisee TEST - I agree to the finalisation of this appraisal
<input type="checkbox"/>	Louise Reviewer Test - I agree to the finalisation of this appraisal

A Window will appear confirming if you wish to finalise, tick the box to Confirm to send an Action back to the Appraisee.

This returned action by the Appraiser will allow the Finalisation process to be activated and either an Appraisee or an Appraiser can finalise the form.

Once the finalisation process has been initiated by one party, the process will require the other party to Finalise to complete the process.

The Finalisation process should only be completed towards the end of the Appraisal Cycle.