

In this Quick Reference Guide

Follow these step by step instructions on how to access and review/ complete an appraisal as the appraiser including, how to share it with a 2nd manager where the appraisee has two posts.

The Appraisal is a three part process:

1. The Appraisee creates the appraisal, answers the questions, and submits it to the Appraiser for review.
2. A date is set for the Appraisal conversation. Following the appraisal, the appraiser writes up their comments, feedback, and updates or amends the agreed objectives and sends it back to the appraisee for final review. Where the appraisee has more than one line manager, the appraisal can be forwarded to a 2nd line manager to add objectives and comments before sending it back to the appraisee.
3. The appraisee adds their own comments and completes the final sign off.

1. Navigate to the Appraisal

1. Click the **My Appraisal** tile on the home page or click **My Appraisal** from the menu bar
2. Click the **Click here for My Appraisal - Manager Overview** tab
3. Filter the results by either:

- Select 'Hide Previous Appraisals' from the **View a Saved Search** drop down

OR

- Set the **Users Workflow Status** to: and click **Search**

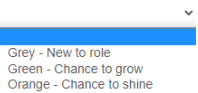
4. Click **Appraiser** from the **View As...** column on the relevant appraisee
5. Click **Start**
6. Navigate through the appraisal reviewing your appraisee's answers and complete all relevant fields on the Manager Summary tab as appropriate.
Note: you can also add objectives/goals
7. Once completed click **Next** to send the appraisal back to the appraisee for their final comments.

Question Types

Date	Click the icon and select a date from the calendar
Free Text	Click in the box and type to enter your answer <input type="text" value="Your answer"/>
Radio Buttons	Click the radio button next to the answer that you would like to select. <input type="radio"/> Partially Meets <input type="radio"/> Meets <input type="radio"/> Exceeds

Drop Down Box

Click the drop down box and select the relevant answer from the list.



Navigation

The navigation buttons can be found at the bottom of each appraisal form page.

Next

Click this to move to the next page in the appraisal.
Note: Clicking Next on the final page will either send the appraisal to the appraisee or to their second manager if you have selected one.

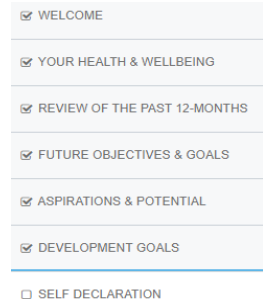
Save and Exit

Click this to save your progress and exit the appraisal.

Save as Draft

Click this to save the appraisal as a draft to come back to later.

Alternatively you can navigate to any page in the appraisal using the navigation menu on the left. Click on any of the sections to go to that page.



Expanding Fields

Some fields are hidden and need to be opened to be viewed, if there is purple text such as: [Your Role](#) click on the subtitle to open the section. This is primarily located on the Review of the Last 12-Months page

More than one Line Manager?



If the Appraisee has more than one line manager select 'Yes' and click **Select User**, search for the user, click on the correct person and click **Save**, repeat this process until all managers are added.

If someone is added incorrectly click the **X** next to their name to remove them.

Does this Team Member have another role with a 2nd manager?

Your answer* Yes
 No

Name of 2nd Manager (if selected Yes above)

Select user

Once the appraisal has been submitted by the appraiser an email will be sent to the second manager with a link to access the appraisal.

Download a PDF



You are able to download a copy of the appraisal at any point, click [Download PDF](#) located at the top of the appraisal page.

2. Accessing the Appraisal as a 2nd Manger

If you are a 2nd manager, you will receive an email to notify you to review the appraisal once the appraisal has been reviewed by the appraiser.

1. Click the **My Appraisal** tile on the home page or click [My Appraisal](#) from the menu bar
2. Click the [Click here for My Appraisal - Manager Overview](#) tab
3. Filter the results by either:
 - Select 'Hide Previous Appraisals' from the View a **Saved Search** drop down

OR

 - Set the **Users Workflow Status** to: and click [Search](#)
4. Click [2nd Manager](#) from the **View As...** column on the relevant appraisee
5. Click [Start](#)
6. Navigate through the appraisal reviewing your appraisee's answers and complete the 2nd Manager Summary on the Manager Summary tab. You can also add objective/goals.
7. Once completed click [Next](#) to send the appraisal back to the appraisee for their final comments.

3. Completion

Once the appraisee has added their final comments, the appraisal process is complete, open the appraisal to view the comments.