

The Appraisal Process Using the Horizon System – Participant Manager

Stage One: Self-Evaluation

1. As appropriate staff can add an additional participant to provide feedback if working to a different manager throughout the year. They do this by selecting **No Participants** in the **Annual Review Period**.
2. The first stage of the appraisal process is for your report to complete their **Self-Evaluation**. Here they will give their thoughts and observations on their objectives from the previous year.
3. Once they have done this you will be notified on Horizon to complete the second stage of the process, the **Managers Evaluation**.

Feedback Requested

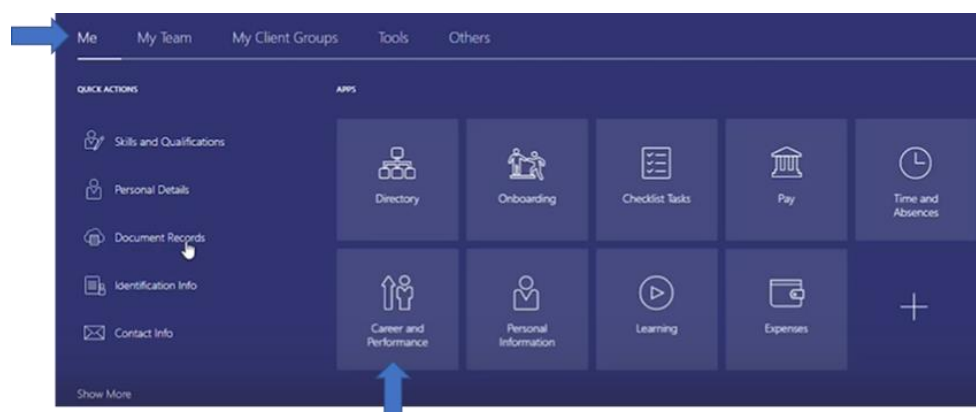
You are requested to provide feedback for performance document 2020-21 Annual Performance Review for Charles Allen (Charlie).

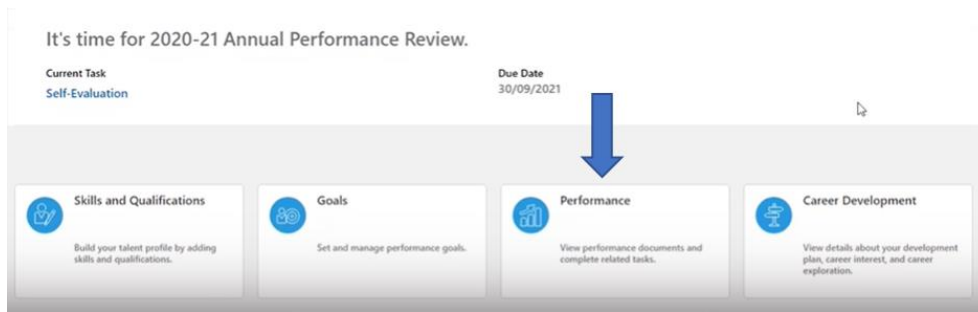
You are requested to provide feedback for the performance document 2020-21 Annual Performance Review for Charles Allen (Charlie) by 23/07/2021.

Performance Document Name	2020-21 Annual Performance Review
Comments	Hi Sian, please provide your feedback by the date indicated. Many thanks, Charlie
Review Period	2020-21 Annual Review Period
Performance Document Start Date	1/05/2020
Performance Document End Date	30/04/2021

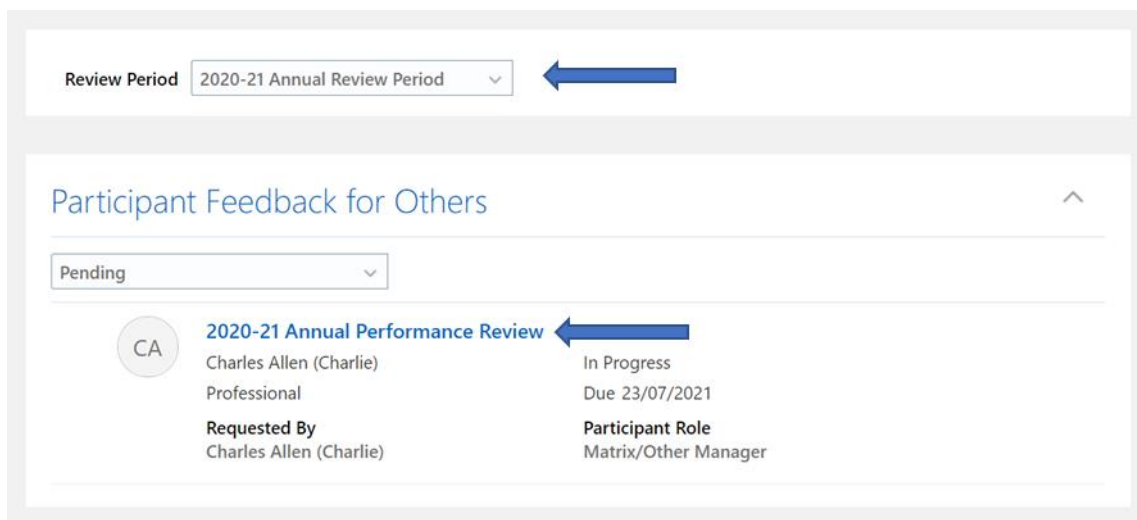
Stage Two: Providing Feedback as a Participant Manager

1. To see the participants Self-Evaluation, select **Me > Career and Performance > Performance**.

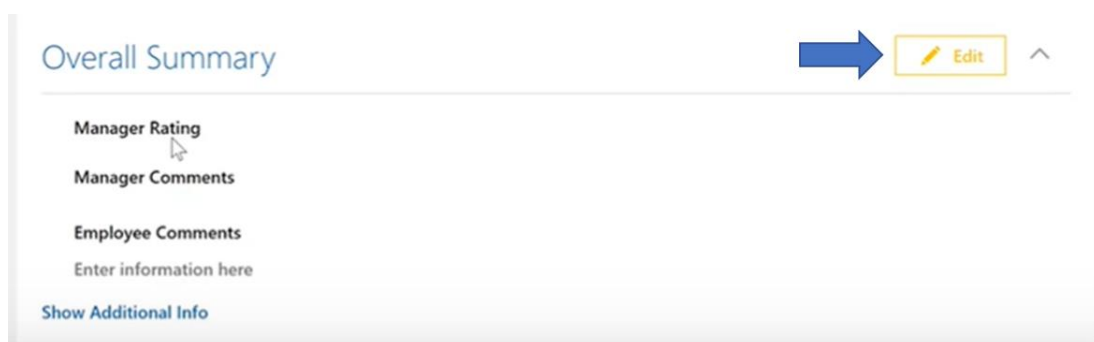




2. Change the review period to the previous academic year. You will then be able to see **Participant Feedback for Others**.
3. Click on **Annual Performance Review** to see any information your report has submitted as part of their evaluation.



4. By selecting **Edit by Overall Summary**, you can draft your evaluation in preparation for the appraisal meeting as well as read through any comments made by the employee as part of their self-evaluation.



5. You can also add comments against **Values and Behaviours** by selecting **Evaluate**.

Evaluation Topics

Values/Behaviours 1 of 3 commented	Evaluate
Performance Objectives 0 of 1 commented	Evaluate
Career and Development Objectives 0 of 0 commented	Evaluate
Questionnaire	Evaluate

- The comments you make will automatically be saved. Therefore, when you have completed your initial draft of the appraisal click on the back arrow in the top left corner. You should only submit the document after an appraisal conversation has been had with your direct report.

Participant Feedback: 2020-21 Annual Performance Review
Charles Allen (Charlie)

Print Submit

- Following this conversation, you may want to return to your evaluation and amend any of the comments made by selecting **Edit**.
- You will also need to submit a manager rating under **Overall Summary** and comments to justify your rating. This is the only mandatory element of the appraisal form. Then, click on **Save**.

Overall Summary

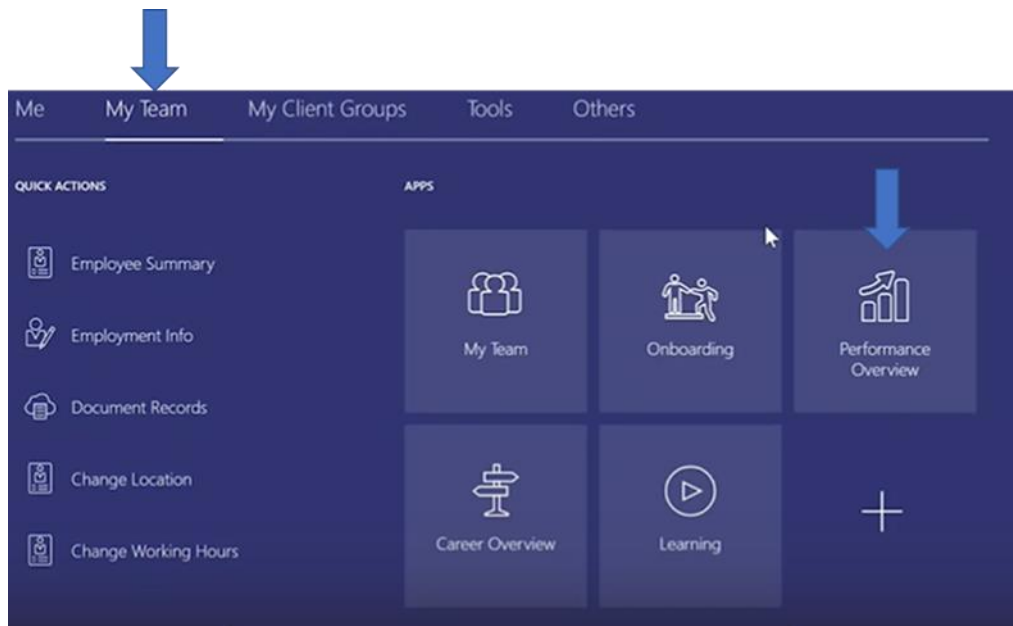
Manager Rating

Save Cancel

- Once you are happy with the content inputted select **Submit** in the top right corner of the page. This will then send your appraisal comments to the report and their manager.

Stage Three: Viewing Participant Manager Feedback (Manager)

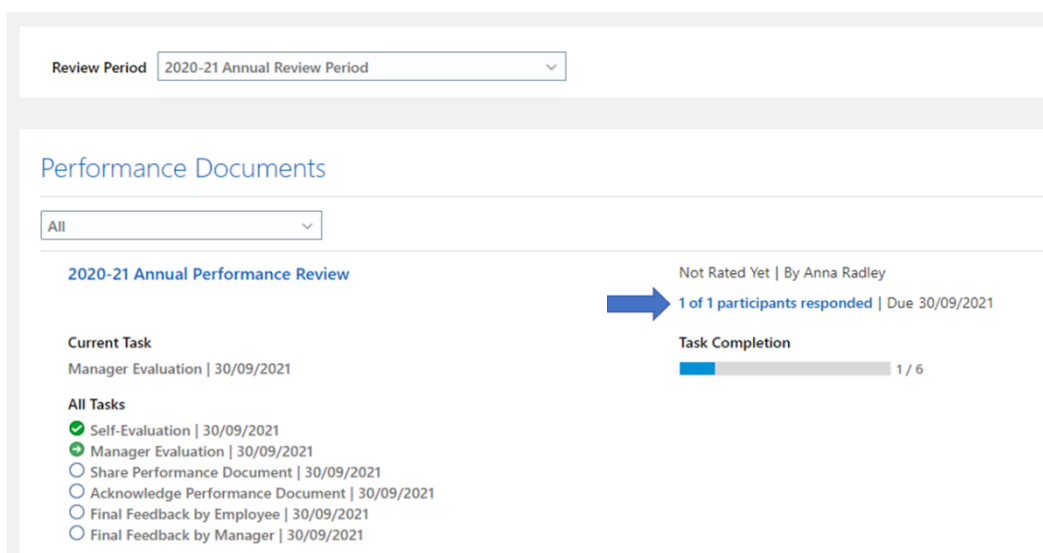
- After a Participant Manager has submitted feedback, you will be able to view this along side your own Managers Evaluation.
- Select **My Team > Performance Overview**.



3. You will then see a list of all your direct reports. Click on the employee's name who you would like to review to begin your evaluation.
4. Change the review period to **the current academic year**



5. You will be able to see that the Participant Manager has completed the evaluation as the participants responded will change from **0 of 1 participants responded to 1 of 1 participants responded**.



6. To enter your managers evaluation, click on **Annual Performance Review**

Performance Documents

Current

2020-21 Annual Performance Review ←

A | By Laleh Williams
No participants | Due 30/09/2021

Current Task
Manager Evaluation | 30/09/2021

Task Completion
1 / 6

All Tasks

- ✓ Self-Evaluation | 30/09/2021
- Manager Evaluation | 30/09/2021
- Share Performance Document | 30/09/2021
- Acknowledge Performance Document | 30/09/2021
- Final Feedback by Employee | 30/09/2021

7. As you complete your evaluation you can click on **Show Additional Information** to see comments that have been made by the Participant Manager.

Overall Summary

Manager Rating
A

Manager Comments
xyz

Employee Comments
YYY

Hide Additional Info ←

Participant Feedback

Average Participant Rating (1)
A

SA Sian Atkins
Matrix/Other Manager

Overall Rating
A

Comments
xxx

The remaining steps for completing the appraisal process can be viewed in [The Appraisal Process Using the Horizon System – Appraiser](#)