The Appraisal Process Using the Horizon System – Appraiser

Stage One: Self-Evaluation

- The first stage of the appraisal process is for your direct report to complete their Self-Evaluation. Here they will give their thoughts and observations on their objectives from the previous year.
- 2. Once they have done this you will receive a notification on Horizon for you to complete the second stage of the process, the **Managers Evaluation**.

Stage Two: Managers Evaluation

1. To see direct reports Self-Evaluation, select My Team > Performance Overview.

Me	My Team	My Client Groups	Tools	Others	
QUICK AC	TIONS	APPS			
ě	Employee Summary			የትግ	* - Zn
≌⁄⁄	Employment Info		My Team	Onboarding	Performance Overview
6	Document Records				
ê	Change Location		-fg	\bigcirc	+
è	Change Working Hour		Career Overview	Learning	

- 2. 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.
- 3. Change the review period to **the current academic year.**

 If a Participant Manager has been asked to submit feedback you will see they have completed their evaluation as the participants responded will change from 0 of 1 participants responded to 1 of 1 participants responded.

~
Not Rated Yet By Anna Radley
1 of 1 participants responded Due 30/09/2021
Task Completion
1/6

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

erformance Documents	
2021-22 Annual Performance Review	Not Rated Yet By Anna Radley
	No participants Due 30/09/2022
Current Task	Task Completion
Manager Evaluation Due 30/09/2022	1/4
All Tasks	
Self-Evaluation Due 30/09/2022	
Manager Evaluation Due 30/09/2022	
O Provide Final Feedback Due 30/09/2022	
Provide Final Feedback Due 30/09/2022	

- 6. Here you will be able to see any information that your direct report has submitted as part of their evaluation.
- 7. 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.

Overall Summary	Edit ^
Manager Rating Manager Comments	
Employee Comments Enter information here	
Show Additional Info	

8. You can also add comments against **Values and Behaviours** by selecting **Edit**. Where necessary, you can also see comments from participant managers by selecting **Questionnaire**.

Evaluation Topics	^
Values/Behaviours 0 of 3 commented	Evaluate
Performance Objectives 0 of 0 commented	Evaluate
Career and Development Objectives 0 of 0 commented	Evaluate
Questionnaire	Evaluate

9. If necessary, you can click on **Show Additional Information** to see comments that have been made by the Participant Manager.

Evaluate the included competencies.			
	Sort By	Competency Name-A to Z	
Collaboration			
mbracing collaboration - Working together, being open-minded, listening, being adaptable, free-thinking, enterprising and seeking out	t new ideas to	ogether.	
Manager Comments			
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 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				
			<u>S</u> ave	<u>Cancel</u>
	Manager Rating			
		~		

11. Once you are happy with the content inputted select **Submit** in the top right corner of the page. This will then move the appraisal process onto the next stage of sharing feedback.

Rolling back the appraisal process

1. If the employee wants to make additional comments to their self-evaluation after they have submitted their reflections select **Return to Employee Self-Evaluation**

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2. This will return the appraisal process back to the self-evaluation stage allowing the employee to make any additional comments

All-in-One Evaluation for Managers Comments

All-in-One Evaluation is an opportunity for Line Managers with multiple direct reports to complete the managers evaluation portion of the appraisal process for all their employees in one location.

1. As before, select **My Team > Performance Overview.** Then select Evaluate Performance on the left-hand side of the page

	Coals and Performance Overview				
I÷	Goals and	Review Period 2023-24 Annual Review Period ~			
	Overview Career Overview	My Team			
60	Evaluate Performance Evaluate Performance	Search Person Q Show Filters			

2. In the top right-hand corner select All-in-One evaluations

	<	Evaluate Performance	All-in-One Evaluations
I÷			
Goals and		Review Period 2022-23 Annual Review Period 🗸	
Overview			
Career Overview		Performance Documents	
Evaluate		Search Person Q Hide Filters	
	233	Saved Search Actions V Sort By End Date - Latest	to Oldest ~

3. Change the review period and performance document to the current academic year

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All-in-One Evaluations		Cancel Submit
	Review Period 2022-23 Annual Review Period	Performance Document Select a performance document
		2022-23 Annual Performance Review
		0

4. Select **All Statuses** to see the appraisals for each of your direct reports. You can navigate each elements of the managers comments through the tabs for Values and Behaviour, Performance and Development, Career and Development Goals and Overall Summary.

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2022-23 Annual Perf	ormance Revie	ew		Cancel Submit
Values/Behaviours Performance Go	hals Career and Davel	Re 20	view Period 222-23 Annual Review Period	Performance Document 2022-25 Annual Performance Review
				Sort By
Name	Status	Commented		Ş
CA Charles Allen (Charlie) Professional	Available to Evaluate	0/0		
SA Sian Atkins Professional	Completed	1/5		

5. Click on the **Comment Icons** under Worker to read through any comments made by our direct reports as part of their self-evaluation.

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2022-23 Annual Per	formance Revie	ew									Cancel	Subr
	-											
			Review Period 2022-23 Annual F	Review Period			,	Performa 2022-2	sce Document 5 Annual Perform	ance Review		
								Sort By 🔻	All Statuses	Not Available Yet	Available to Evaluate	Com
			Collab	oration	Impa	actful	Inclu	Sort By 💌	All Statuses	Not Available Yet	Available to Evaluate	Comj
Name	Status	Commented	Collab	oration Manager	Impa Worker	actful Manager	Inclu Worker	Sort By 💌	All Statuses	Not Available Yet	Available to Evaluate	Comj
Name	Status	Commented	Collab Worker Comments	oration Manager Comments	Impa Worker Comments	actful Manager Comments	Inclu Worker Comments	Sort By	All Statuses	Not Available Yet	Available to Evaluate	Comp
Name	Status Available In Footate	Commented	Collab Worker Comments	oration Manager Comments	Impe Worker Comments	Actful Manager Comments	Inclu Worker Comments	Sort By	All Statuses	Not Available Yet	Available to Evaluate	Comj

6. Click on the **Comments Icon** under Manager to draft your evaluation in preparation for the appraisal meeting. The comments you make will be saved automatically when you select done but should not be submitted until after an appraisal conversation has been had with your direct report.

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Rati CA TEST	ngs and Comments Charles Allen (Charlie) Professional	
AR ¶est	Anna Radley Manager	
		Done

 You will also need to submit a manager rating under **Overall Summary** and add comments to justify your rating. This is the only mandatory element of the appraisal form.
Double click on rating box under **performance** to see a drop-down menu of ratings.

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			Sor	t By 🔻	All Statuse	s Not Available Ye	Available to Evaluate	Completed
		Ì		Sun	nmary			
Name		Status	Worker	Manager				
	Charles Allen (Charlie)		Comments	Perfor	mance *	Comments *		
CA	Professional	Available to Evaluate		A*	Ð	Ę		
SA	Sian Atkins Professional	Completed	Ę					
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 Once you have completed all the relevant information for all employees you can select Submit in the top right corner. You will receive the below warning message to ensure you are happy to proceed and should select continue to move the appraisal process to employee final feedback for all your direct report.



9. If you have not completed the mandatory fields for all employees, you will receive an error message next to Status. The area you need to complete will be marked with a red box. Once you have filled in the necessary field, click submit.

2022-23 Annual Perfe	ormance Revie	w	k		Variation	Cancel Sub-
			Review Per 2022-23	^{lod} Annual Review Perioc	1	Performance Decorrect 2022-23 Annual Performance Review
/alues/Behaviours Performance (Goals Career and Dev	elopment Goals	Questionn	aire Overall Summ	ary	
						Sort By
				Summary		
Name	Status	Messages	Worker	Manaj	ger	
			Comments	Performance *	Comments *	
CA Charles Allen (Charlie) Professional	Error Warning	₽			Þ	

Stage Three: Employee Final Feedback

- 1. The employee will have a final opportunity to review the content
- 2. Once they have checked the feedback and rating, they will **Continue** to approve the appraisal.
- 3. They will then add a comment and **Submit** the appraisal passing it onto the final stage.

Stage Four: Managers Final Feedback

1. Again, click on Annual Performance Review for a final review of the content.

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2021-22 Annual Performance Review		A By Anna Radley	
		No participants Due 30/09/2022	
Current Task		Task Completion	
Provide Final Feedback Due 30/09/2022		3/4	
All Tasks			
Self-Evaluation Due 30/09/2022	G		
Manager Evaluation Due 30/09/2022			
Provide Final Feedback Due 30/09/2022			

- 2. You can conduct a final review of the appraisal and read your employee's final comment.
- 3. Click on **Continue** to approve the appraisal.



4. You will then be asked to input some comments about the appraisal.

Manager Comments						
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