

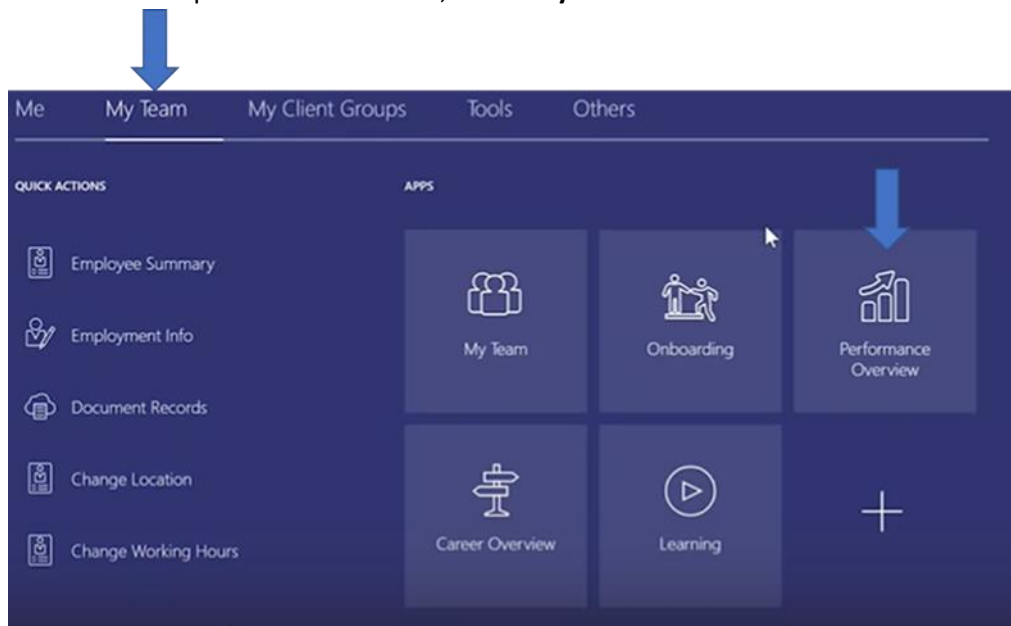
The Appraisal Process Using the Horizon System – Appraiser

Stage One: Self-Evaluation

1. 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

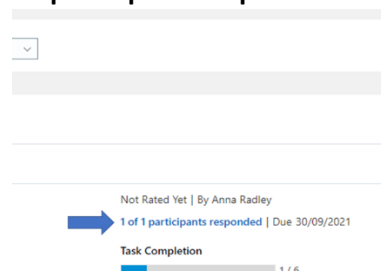
1. To see direct reports Self-Evaluation, select **My Team > Performance Overview**.



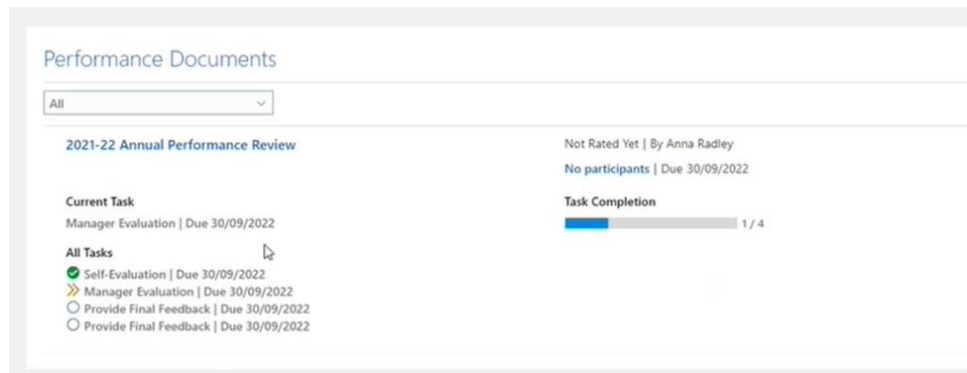
2. You will then see a list of all your direct reports. Click on the employee's name who you would like to review to begin your evaluation.
3. Change the review period to **the current academic year**.

A screenshot of a 'Review Period' dropdown menu. The dropdown is open, showing a list of options. The selected option is '2021-22 Annual Review Period'. The dropdown is located within a light gray rectangular box.

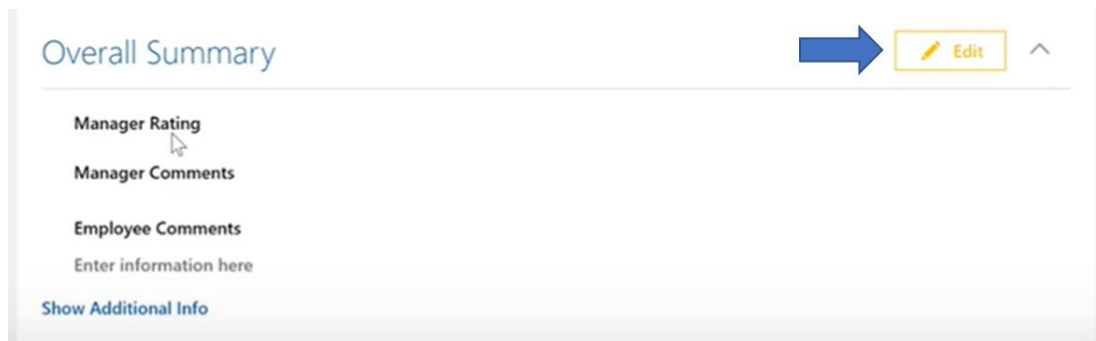
4. If a Participant Manager has been asked to submit feedback you will see they have completed their evaluation as the participants responded will change from **0 of 1 participants responded to 1 of 1 participants responded**.



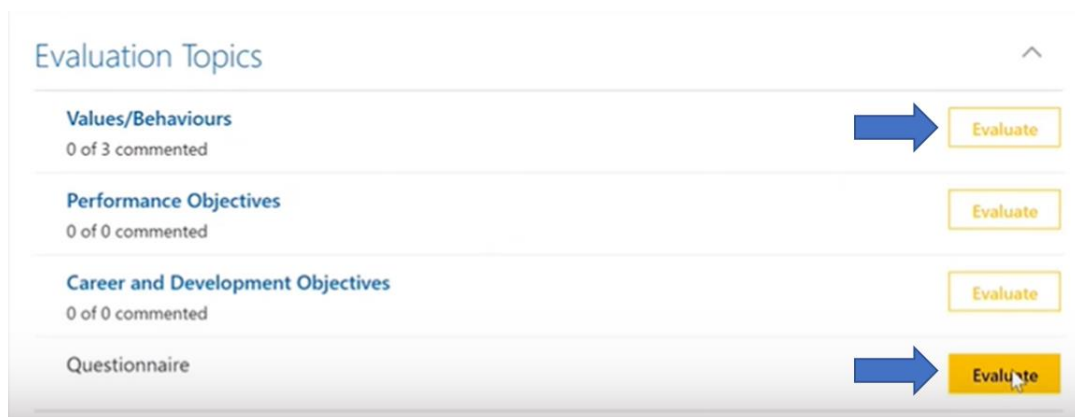
5. To enter your managers evaluation, click on **Annual Performance Review**



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.



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**.



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

10. 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

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**

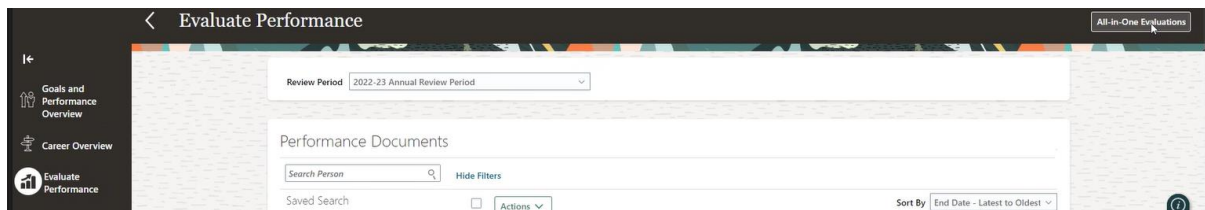
2. This will return the appraisal process back to the self-evaluation stage allowing the employee to make any additional comments

All-in-One Evaluation for Managers Comments

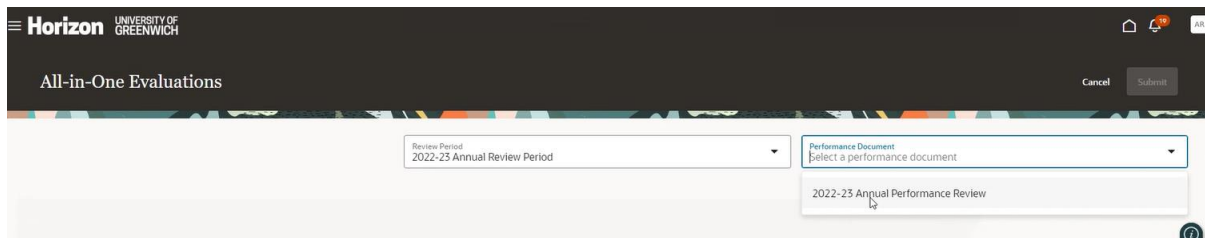
All-in-One Evaluation is an opportunity for Line Managers with multiple direct reports to complete the managers evaluation portion of the appraisal process for all their employees in one location.

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

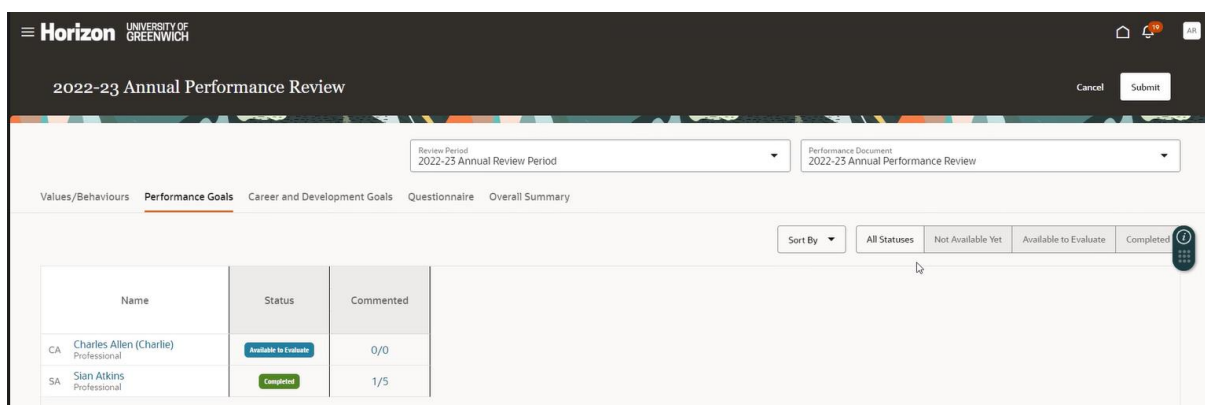
2. In the top right-hand corner select **All-in-One evaluations**



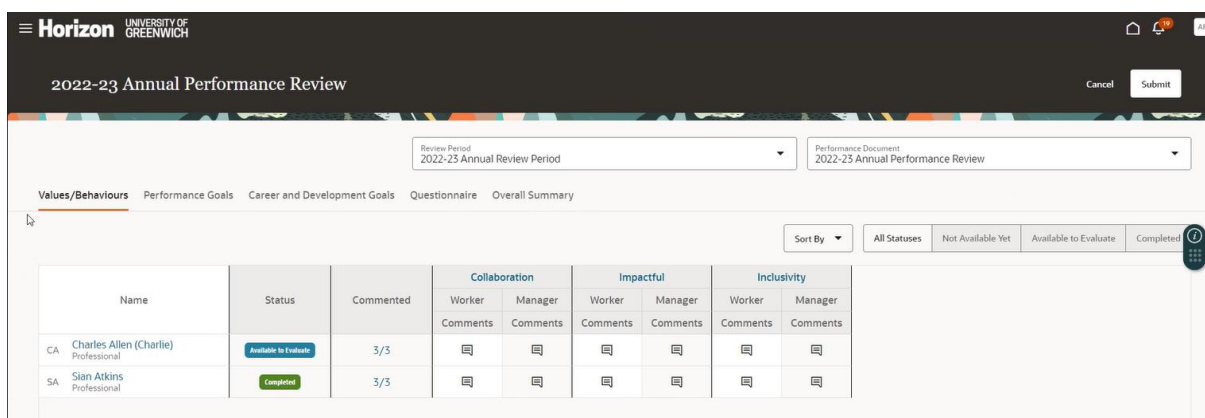
3. Change the review period and performance document to the current academic year



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



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



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.

Summary

Charles Allen (Charlie)

Ratings and Comments

CA

Charles Allen (Charlie)

Professional

TEST

AR

Anna Radley

Manager

Test

Done

7. 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.

2022-23 Annual Performance Review

Cancel Submit

Review Period

2022-23 Annual Review Period

Performance Document

2022-23 Annual Performance Review

Values/Behaviours

Performance Goals

Career and Development Goals

Questionnaire

Overall Summary

Sort By

All Statuses

Not Available Yet

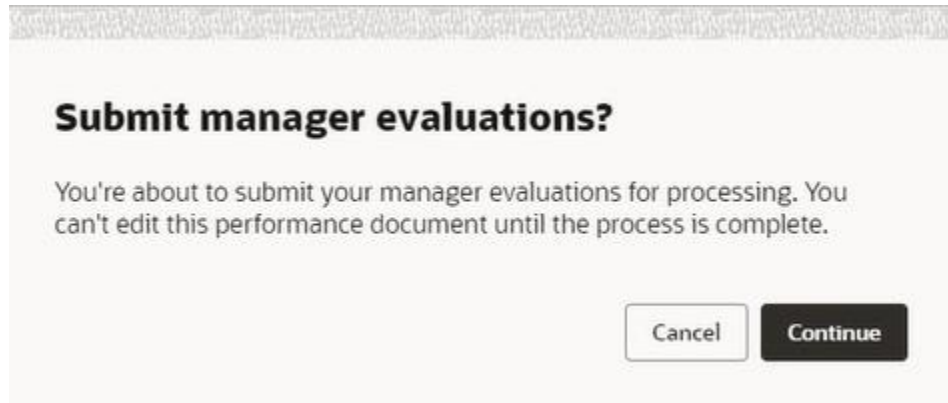
Available to Evaluate

Completed

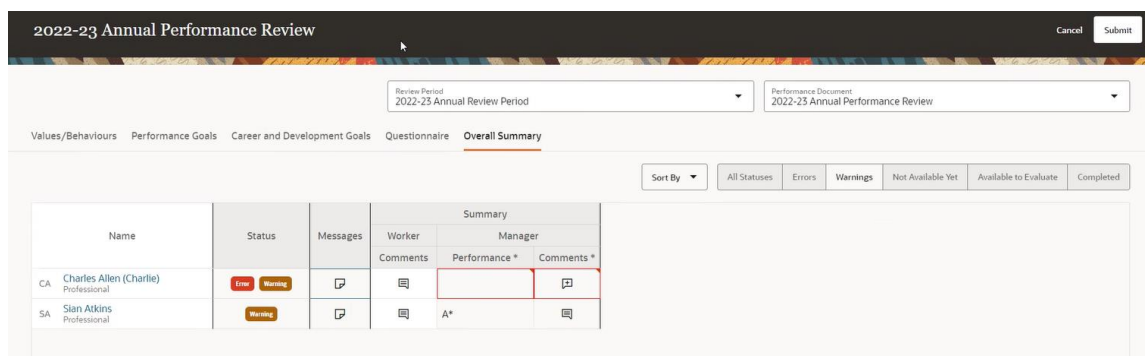
Name	Status	Summary		
		Worker	Manager	
		Comments	Performance *	Comments *
CA Charles Allen (Charlie) Professional	Available to Evaluate		A*	
SA Sian Atkins Professional	Completed			

A*
A
B
C
D

- 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.



- 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.

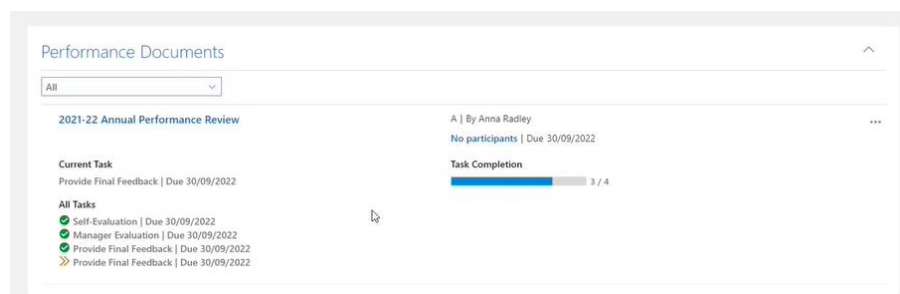


Stage Three: Employee Final Feedback

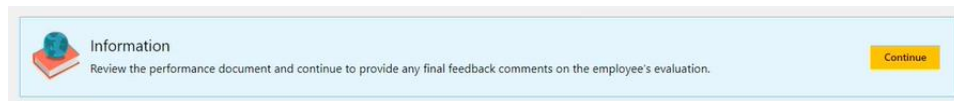
- The employee will have a final opportunity to review the content
- Once they have checked the feedback and rating, they will **Continue** to approve the appraisal.
- They will then add a comment and **Submit** the appraisal passing it onto the final stage.

Stage Four: Managers Final Feedback

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



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.

Comments

Manager Comments

Tahoma 12 B I M

I I

Paragraphs: 0 Words: 0 Characters (with HTML): 0

Employee Comments

Write final comments here