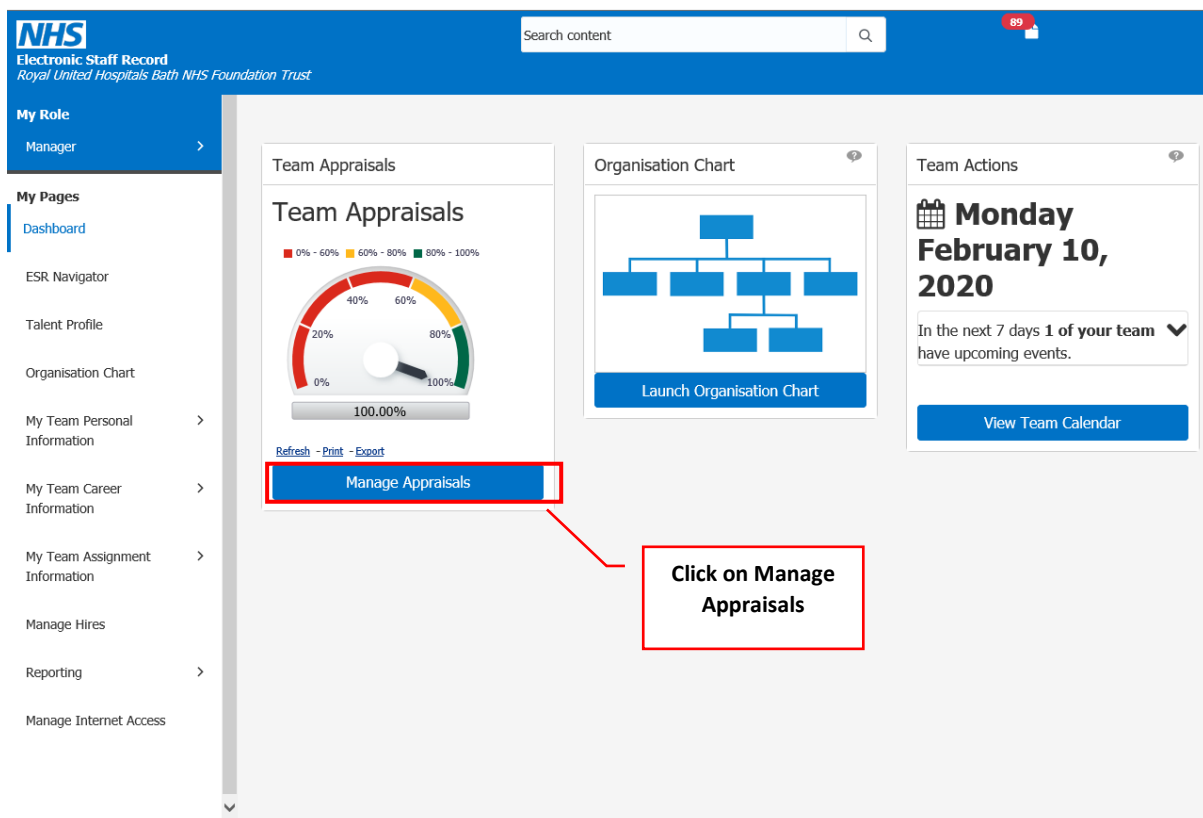
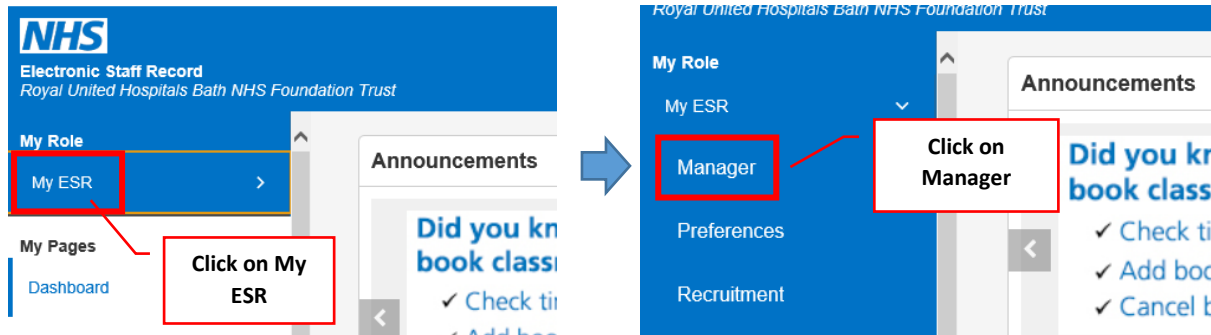


## ESR HOW TO GUIDE – RECORDING APPRAISAL DATE AND UPLOADING APPRAISAL DOCUMENT (OPTIONAL)

### STEP 1 – Accessing the Appraisal section



## STEP 2 – Selecting the individual to Appraise

Confirmation  
The appraisal is complete.

### Appraisals and Reviews As Main Appraiser

These tabs list in progress and completed Appraisals and Reviews for which you are the Main Appraiser. To see Appraisals and Reviews for people in your people hierarchy (if you are not the Main Appraiser), click View Appraisals and Reviews in People Hierarchy.

Appraisals and Reviews In Progress

Create Standard Appraisal **Go**

Initiator	Appraisee	Appraisal Date	Appraisal Status	Appraisal Purpose	Plan	Participation Status	Period Start Date	Period End Date	Download	Select a File	Clear Offline Status	Upload	Print	Details	Appraise	Delete	Journal
No results found.																	



In Progress: Main Appraiser >

### Create Standard Appraisal: People in Hierarchy

**TIP** Click the action button next to the employee you wish to action. Click the details button for more information about the employee.

Focus	Name	Assignment Number	Job	Organisation	Action	Details
[-]	Howse, Mr. Andrew					
[+]	French, Mr. Benjamin Callum					
[+]	Gulliford, M					

**Click on [plus icon] to expand the list if necessary**

**Click on [action icon]**

## STEP 3 – Entering the Appraisal Details

### Create Standard Appraisal: Setup Details

Step 1 of 2

Employee Name  
 Employee Number

Cancel Save and Close Add Details

#### Setup Details

**TIP** You cannot change the appraisal template or the assignment after clicking Next.  
 \* Indicates required field

\* Review Type

\* Period Start Date

\* Period End Date

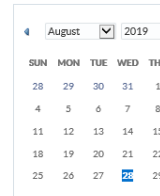
\* Template

\* Appraisal Date

Next Appraisal Date

Assignment Number

\* Main Reviewer



**2. Click Add Details when complete**  
 (If you would like to also upload the appraisal documentation then click Save and Close instead and follow steps on page 6)

**1. Add the appraisal details (see below)**

<b>Review Type:</b>	Select <b>Performance Appraisal</b> from drop down menu
<b>Period Start Date:</b>	Select from the calendar the <b>start date of the retrospective period that is being appraised</b>
<b>Period End Date:</b>	Select from the calendar the <b>end date of the retrospective period that is being appraised</b>
<b>Template:</b>	Type AfC -> select <b>AfC Development Review</b> from search menu
<b>Appraisal Date:</b>	Select from calendar the date the appraisal took place
<b>Next Appraisal Date:</b>	Enter the next appraisal date (By default this should be no later than 12 months from the previous appraisal date) *
<b>Assignment Number:</b>	This is the assignment number of the individual being appraised
<b>Main Reviewer:</b>	By default this will list the individual updating ESR

*\*Although this is not a mandatory field, this date is used to generate reminder notifications of upcoming appraisal, so please ensure it is completed.*

## STEP 4 – Finalising the appraisal

Update Standard Appraisal: Overview  
 Step 2 of 2

Employee Name \_\_\_\_\_ Organisation \_\_\_\_\_  
 Employee Number \_\_\_\_\_ Job \_\_\_\_\_  
 Supervisor \_\_\_\_\_

Objectives

Save and Close | Back | **Save and Proceed**

**Click Save and Proceed**

Confirmation  
 Your changes have been saved. You are now required to complete the appraisal.

Main Appraiser Review

Employee Name \_\_\_\_\_ Organisation \_\_\_\_\_  
 Employee Number \_\_\_\_\_ Organization Email Address \_\_\_\_\_  
 Job \_\_\_\_\_ Supervisor \_\_\_\_\_

Setup Details

Share With Appraisee | Update Appraisal | **Complete Appraisal**

**Click Complete Appraisal**

Give Final Ratings: Main Appraiser

Employee Name \_\_\_\_\_ Organisation \_\_\_\_\_  
 Employee Number \_\_\_\_\_ Organization Email Address \_\_\_\_\_  
 Job \_\_\_\_\_ Supervisor \_\_\_\_\_

Competency Ratings

Click Show to view the main appraiser's, the appraisee's, and all participants' ratings.

Details	Competency	Current Proficiency Level	New Proficiency Level
No results found.			

Cancel | Save as Draft | **Continue**

**Click Continue**

Give Final Ratings: Main Appraiser >

Give Final Ratings: Review

To make changes to the appraisal, click Back. To complete the appraisal, click Submit.

Employee Name \_\_\_\_\_ Organisation \_\_\_\_\_  
 Employee Number \_\_\_\_\_ Job \_\_\_\_\_  
 Supervisor \_\_\_\_\_

Competency Ratings

Cancel | Printable Page | Back | **Submit**

**Click Submit**

**Warning**  
 You have chosen to complete this appraisal.  
 You cannot update a completed appraisal. Do you want to continue?

No | **Yes**

**Click Yes**

## STEP 5 – Viewing Completed Appraisal(s)

Confirmation

- The appraisal is complete.
- The appraisal has been deleted.

**Appraisals and Reviews As Main Appraiser**

These tabs list in progress and completed Appraisals and Reviews for which you are the Main Appraiser. To see Appraisals and Reviews for people in your people hierarchy (for which you may not be the Main Appraiser), click View Appraisals and Reviews in People Hierarchy.

Appraisals and Reviews In Progress

Create Standard Appraisal Go

Initiator	Appraisee	Appraisal Date	Appraisal Status	Appraisal Purpose	Plan	Participation Status	Period Start Date	Period End Date	Download	Select a File	Clear Offline Status	Upload	Print	Details	Appraise	Delete	Journal
No results found.																	



Appraisals and Reviews As Main Appraiser

These tabs list in progress and completed Appraisals and Reviews for which you are the Main Appraiser. To see Appraisals and Reviews for people in your people hierarchy (for which you may not be the Main Appraiser), click View Appraisals and Reviews in People Hierarchy.

Current Workers Terminated Workers

Completed Appraisals and Reviews

Filter the list of completed appraisals using any combination of Appraisee, Appraisal Date, and Appraisal Purpose.

Appraisee

Appraisal Date

Appraisal Purpose

Appraisee	Appraisal Date	Appraisal Purpose	Plan	Participation Status	Period Start Date	Period End Date	Download	Select a File	Clear Offline Status	Upload	Print	Details	Appraise	Delete	Journal
Gulliford, Mrs. Lindsay	01-Jul-2019	Review			01-Jul-2018	30-Jun-2019	<input type="button" value="📄"/>	<input type="button" value="📁"/>	<input type="button" value="🔄"/>	<input type="button" value="📤"/>	<input type="button" value="🖨️"/>	<input type="button" value="🔍"/>	<input type="button" value="👤"/>	<input type="button" value="🗑️"/>	<input type="button" value="📖"/>
Gulliford, Mrs. Lindsay	15-Feb-2017	Performance Appraisal			04-Feb-2016	14-Feb-2017	<input type="button" value="📄"/>	<input type="button" value="📁"/>	<input type="button" value="🔄"/>	<input type="button" value="📤"/>	<input type="button" value="🖨️"/>	<input type="button" value="🔍"/>	<input type="button" value="👤"/>	<input type="button" value="🗑️"/>	<input type="button" value="📖"/>

## Step 2.1 (Optional) – Uploading the Appraisal Documentation

This screenshot shows the 'Appraisals and Reviews In Progress' table. The table has columns for Initiator, Appraisee, Appraisal Date, Appraisal Status, Appraisal Purpose, Plan, Participation Status, Period Start Date, Period End Date, Download, Select a File, Clear Offline Status, Upload, Print, Details, Appraise, Delete, and Journal. A red box highlights the 'Journal' icon in the 'Journal' column of the first row.

Initiator	Appraisee	Appraisal Date	Appraisal Status	Appraisal Purpose	Plan	Participation Status	Period Start Date	Period End Date	Download	Select a File	Clear Offline Status	Upload	Print	Details	Appraise	Delete	Journal	
Howse, Mr. Andrew	French, Mr. Benjamin Callum	01-Oct-2019	Saved	Performance Appraisal		Open	01-Sep-2018	30-Sep-2019										

Click on Journal

This screenshot shows the 'Add Attachment' form. It includes fields for Title, Description, and Category (set to Miscellaneous). There are radio buttons for Type: File, URL, Short Text, and Long Text. A 'Browse...' button is next to the File type. At the top right, there are 'Cancel', 'Add Another', and 'Apply' buttons. Three red callouts provide instructions: '1. Add a title and optional description for the file' points to the Title field; '2. Click on Browse and select the appraisal document you wish to upload' points to the Browse button; '3. Click Apply' points to the Apply button.

1. Add a title and optional description for the file

3. Click Apply

2. Click on Browse and select the appraisal document you wish to upload

This screenshot shows the 'Appraisals and Reviews In Progress' table after the attachment has been added. The 'Journal' icon in the 'Journal' column of the first row now has a blue notification bubble with the number '1'.

Initiator	Appraisee	Appraisal Date	Appraisal Status	Appraisal Purpose	Plan	Participation Status	Period Start Date	Period End Date	Download	Select a File	Clear Offline Status	Upload	Print	Details	Appraise	Delete	Journal	
Howse, Mr. Andrew	French, Mr. Benjamin Callum	25-Oct-2019	Saved	Performance Appraisal		Open	01-Sep-2018	01-Sep-2019										

Click on to continue

**PLEASE REFER BACK TO STEP 4 TO COMPLETE APPRAISAL INPUT**