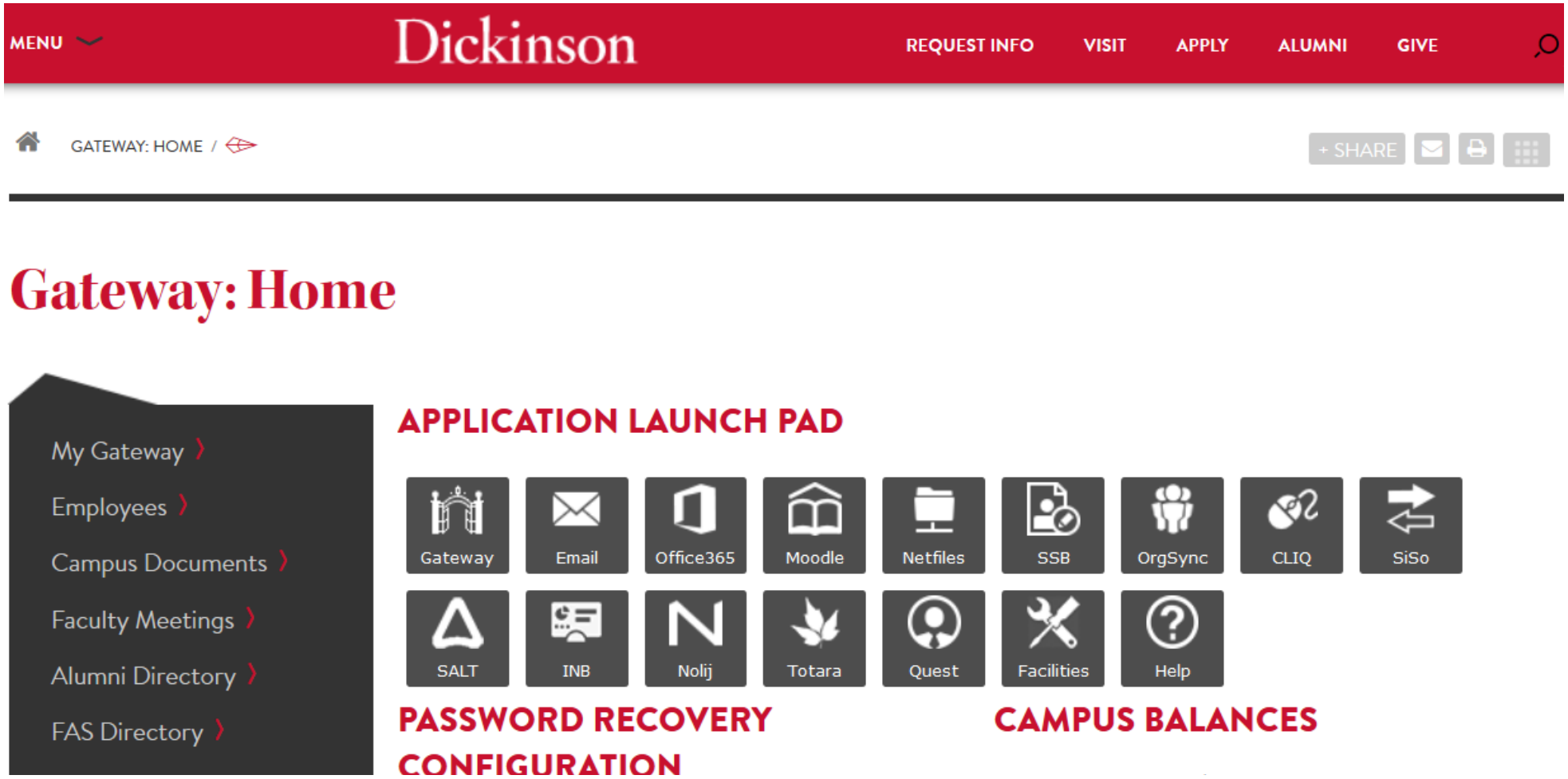
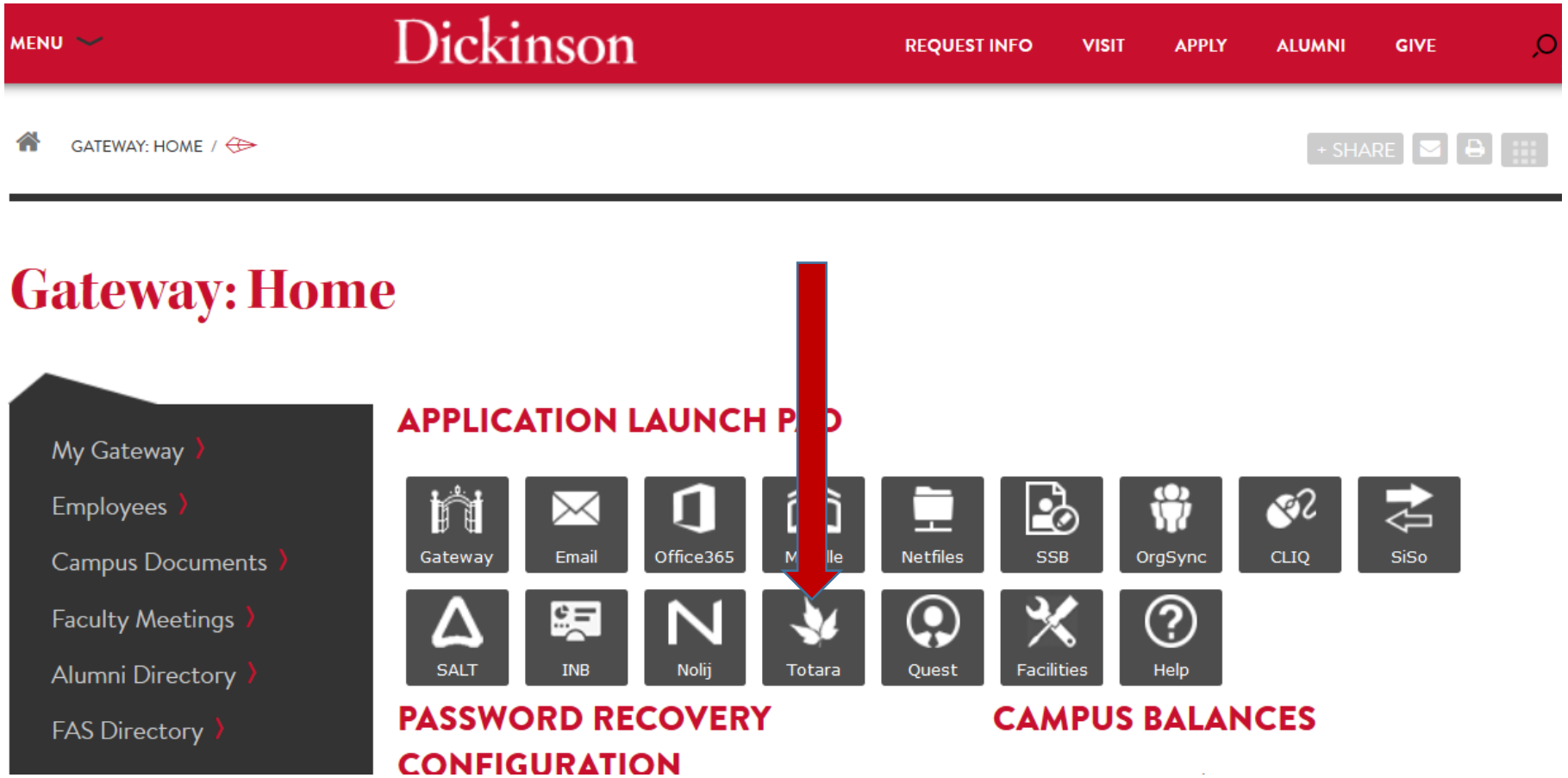
Performance Appraisals in Totara

Supervisory Introduction for Exempt Appraisals

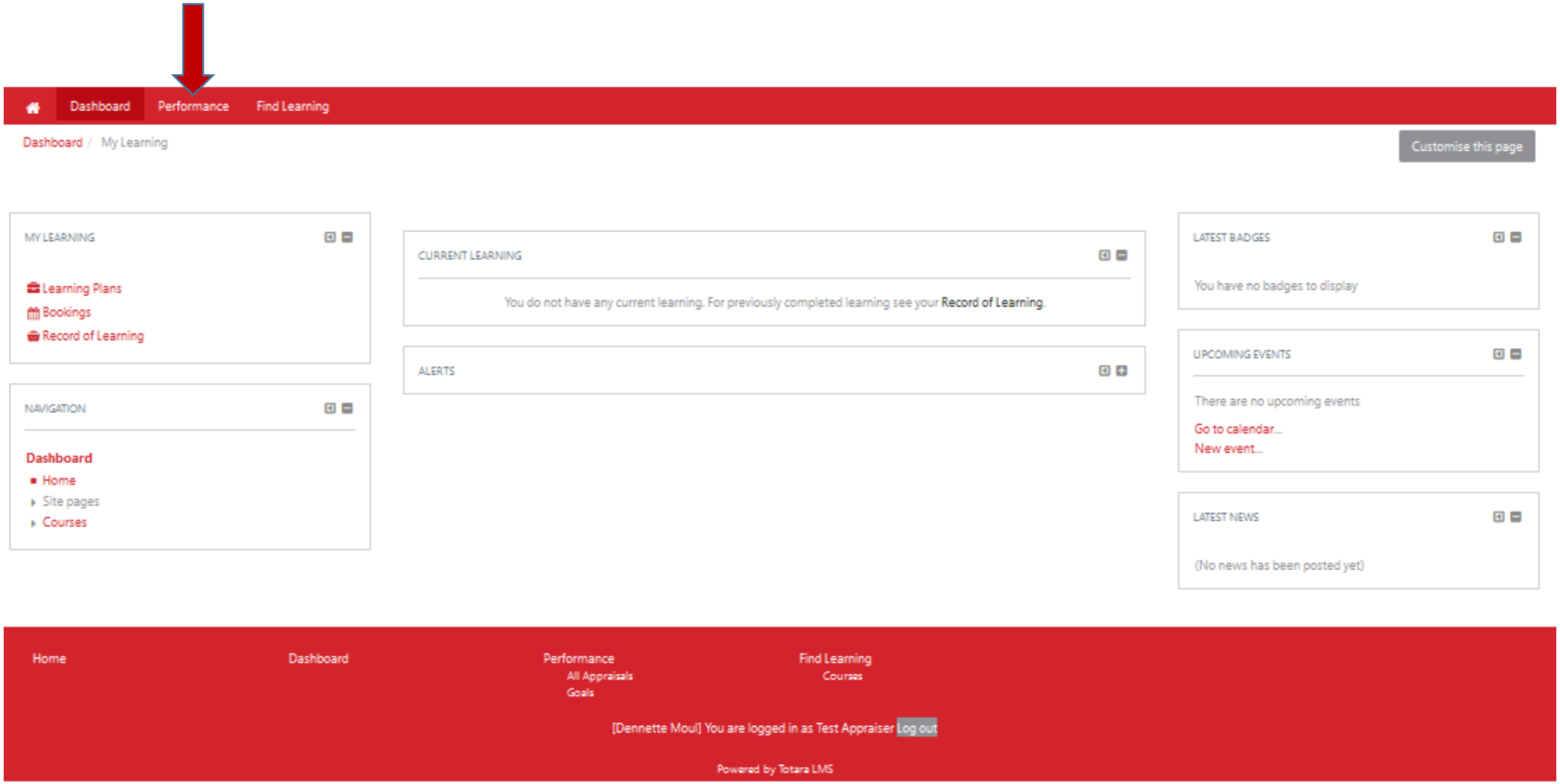
Sign into the Gateway



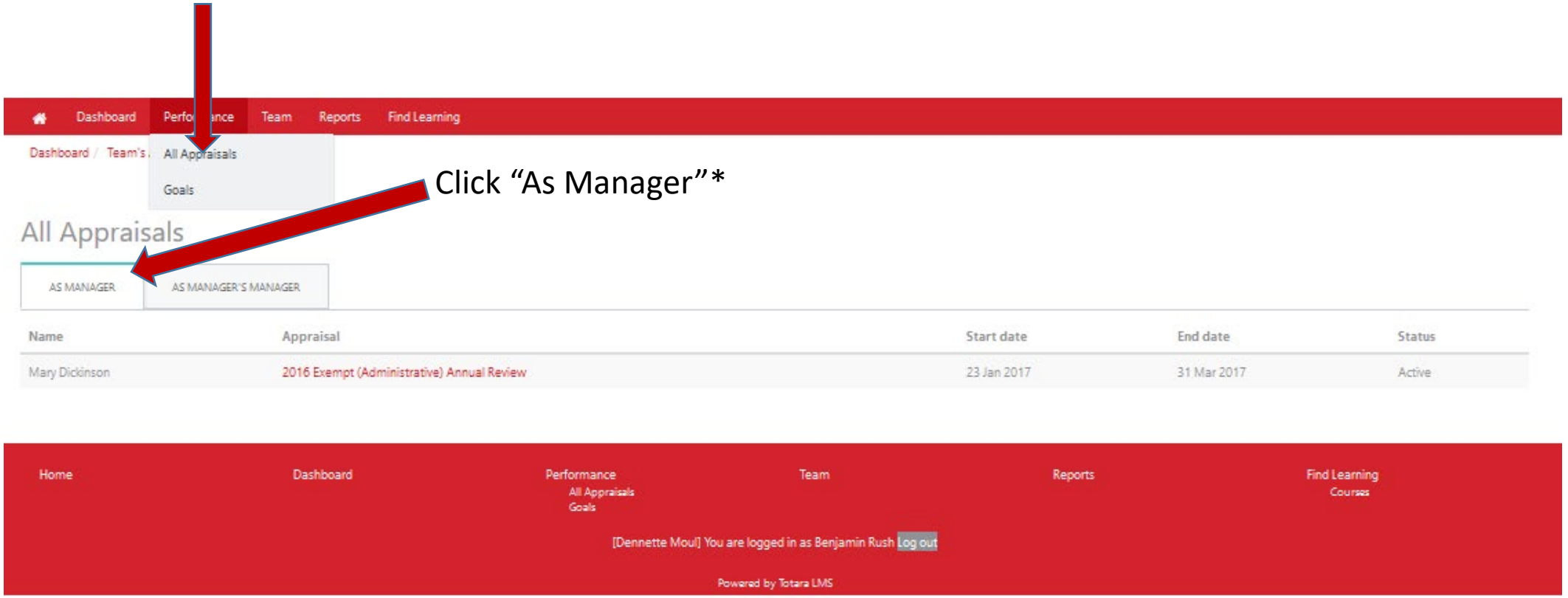
Click on “Totara”



Go to the “Performance” tab

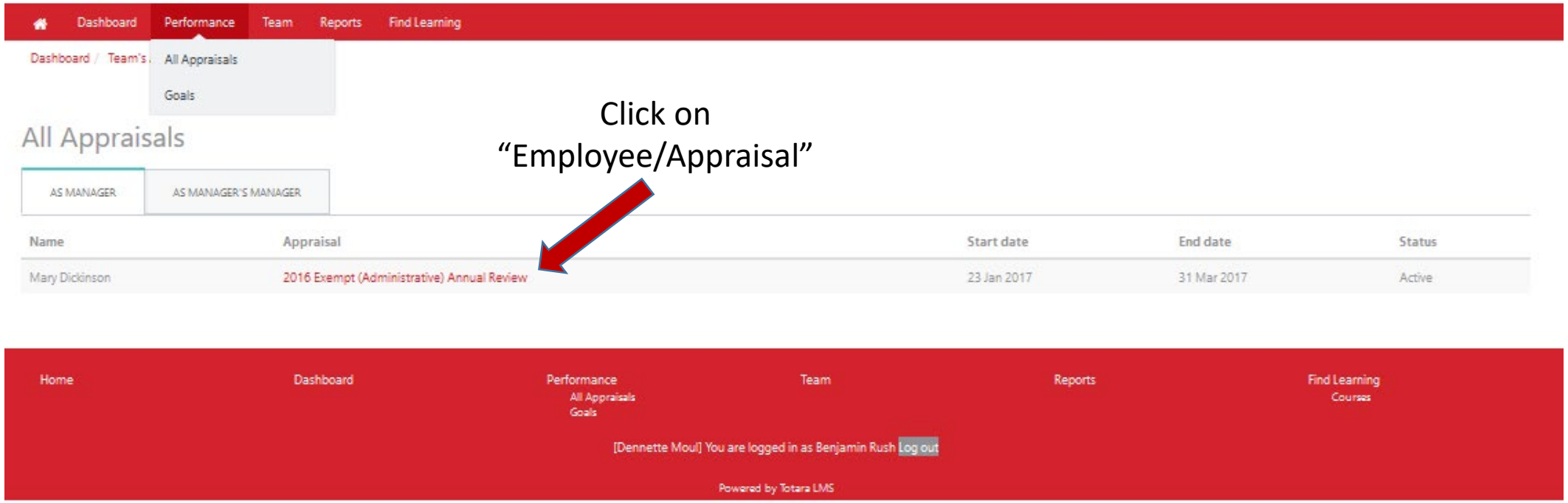


Go to the “All Appraisals”



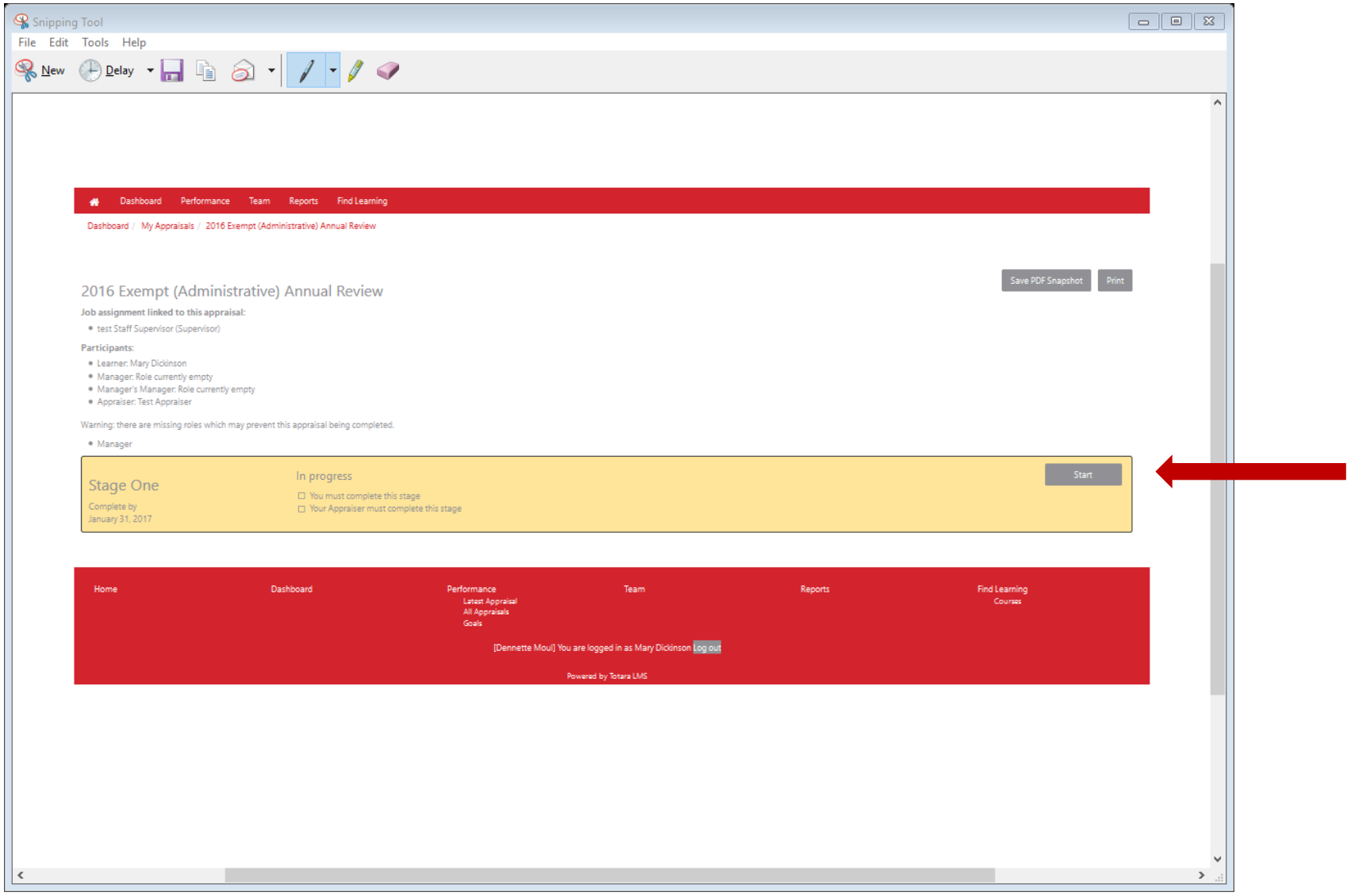
*Appraisals will populate under the “As Manager” tab once the employee has completed the self-appraisal

Performance Appraisal

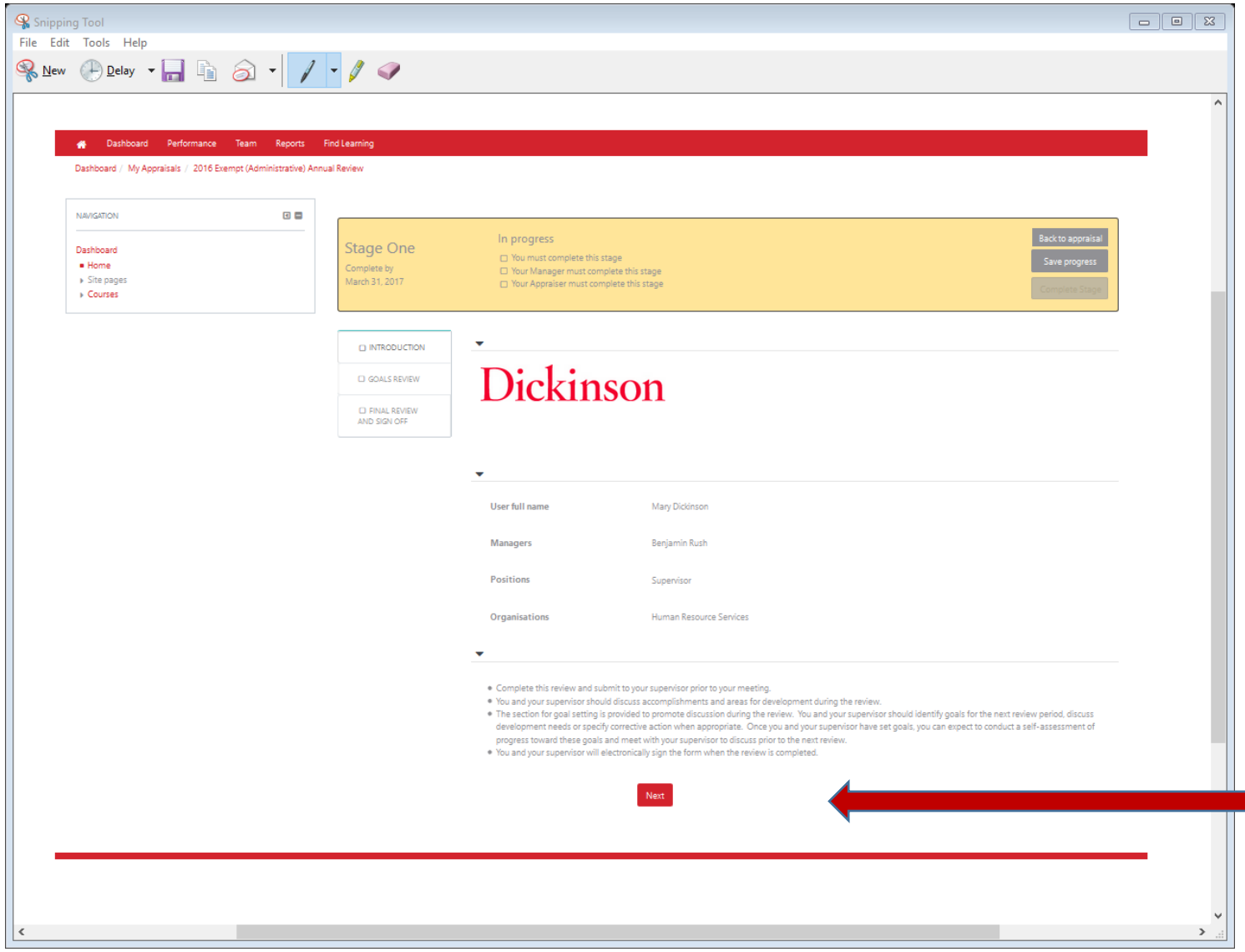


Click on
"Employee/Appraisal"

Next, click “Start”

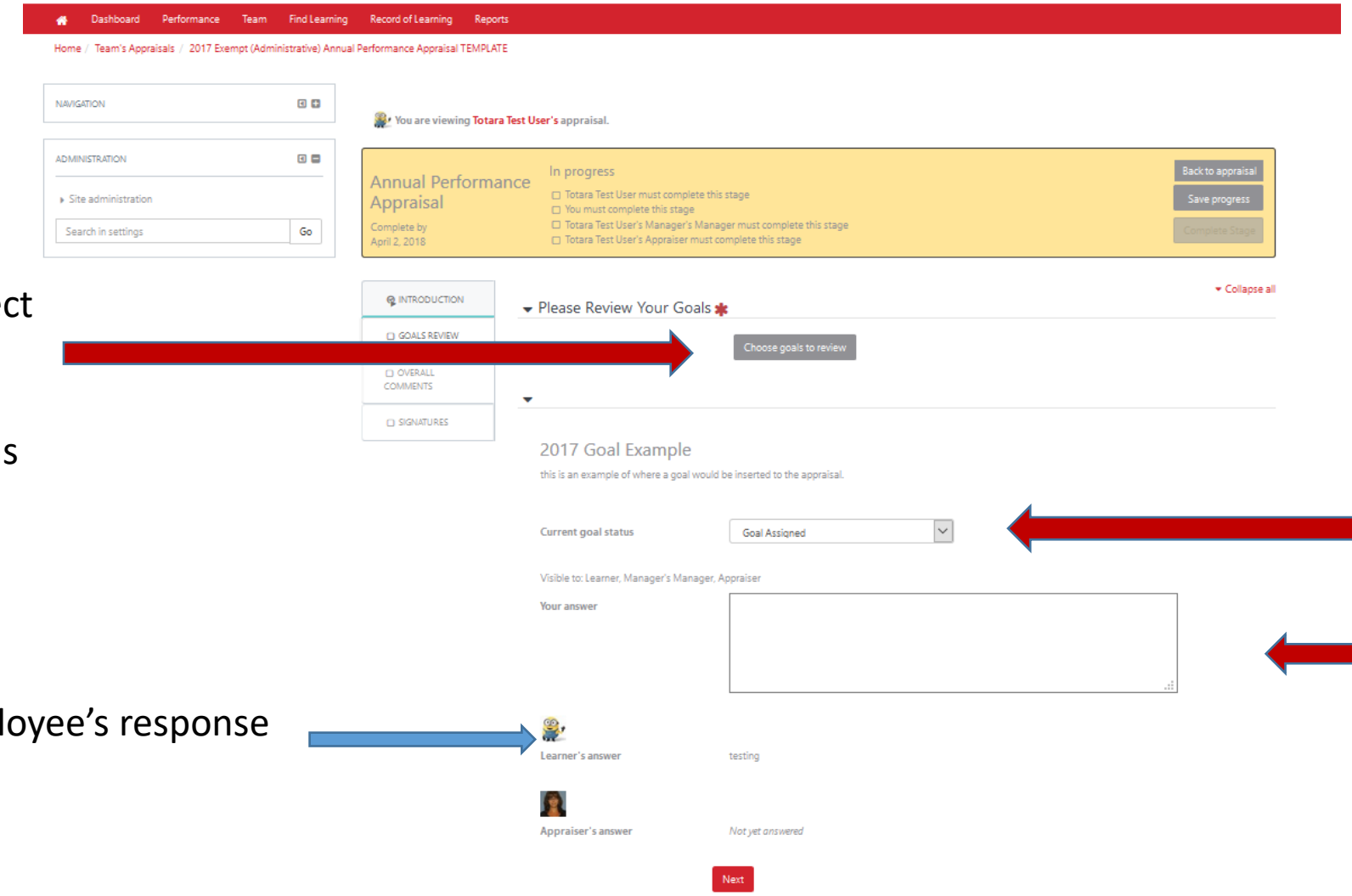


First page of the appraisal



Click Next

Goal Review



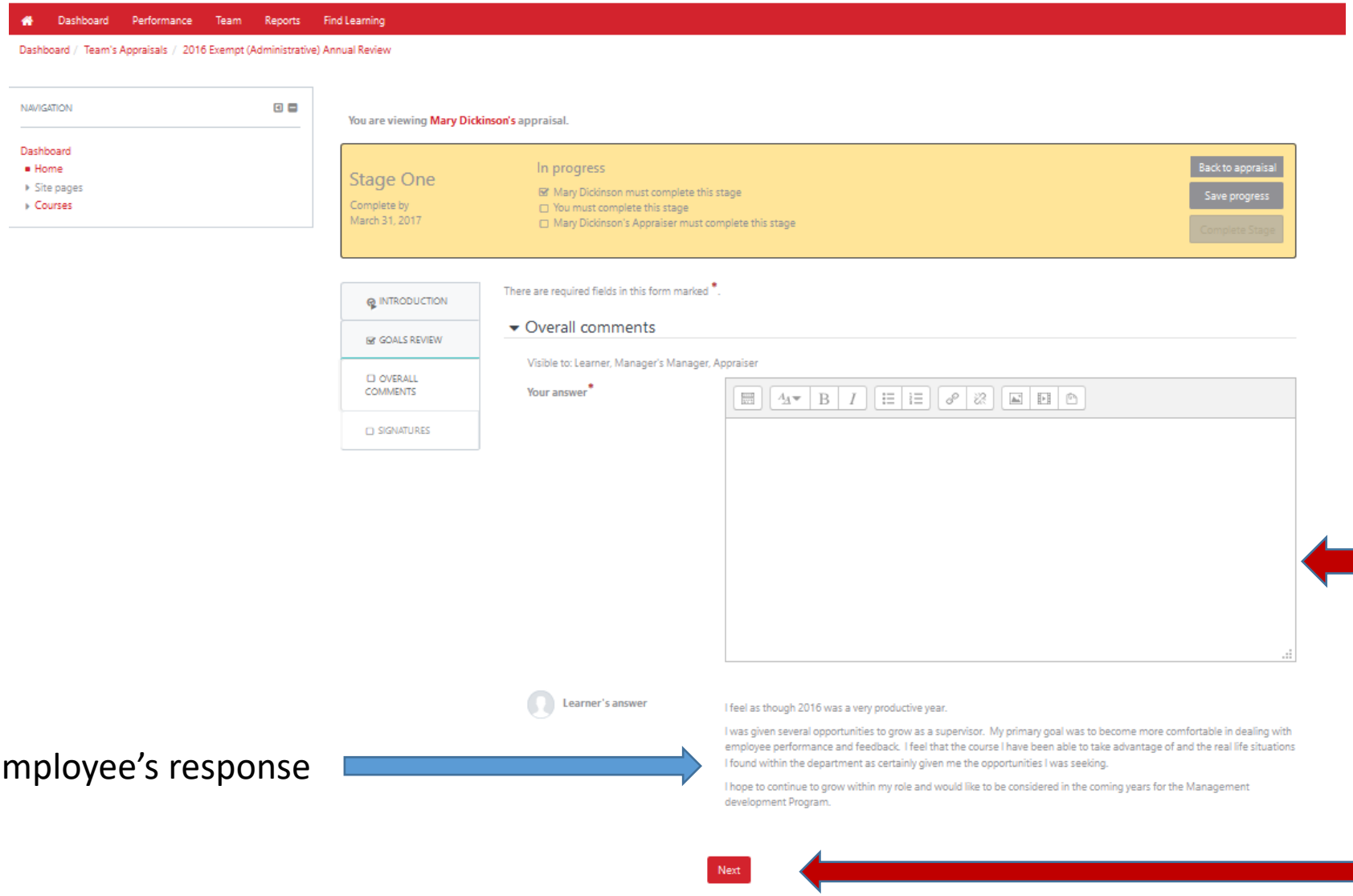
You may select additional goals if the employee has not included all to be reviewed.

Select form drop down appropriate status: *Goal Assigned, Goal in Progress, Goal Completed*

Provide your summary of goal

Employee's response

Overall Comments

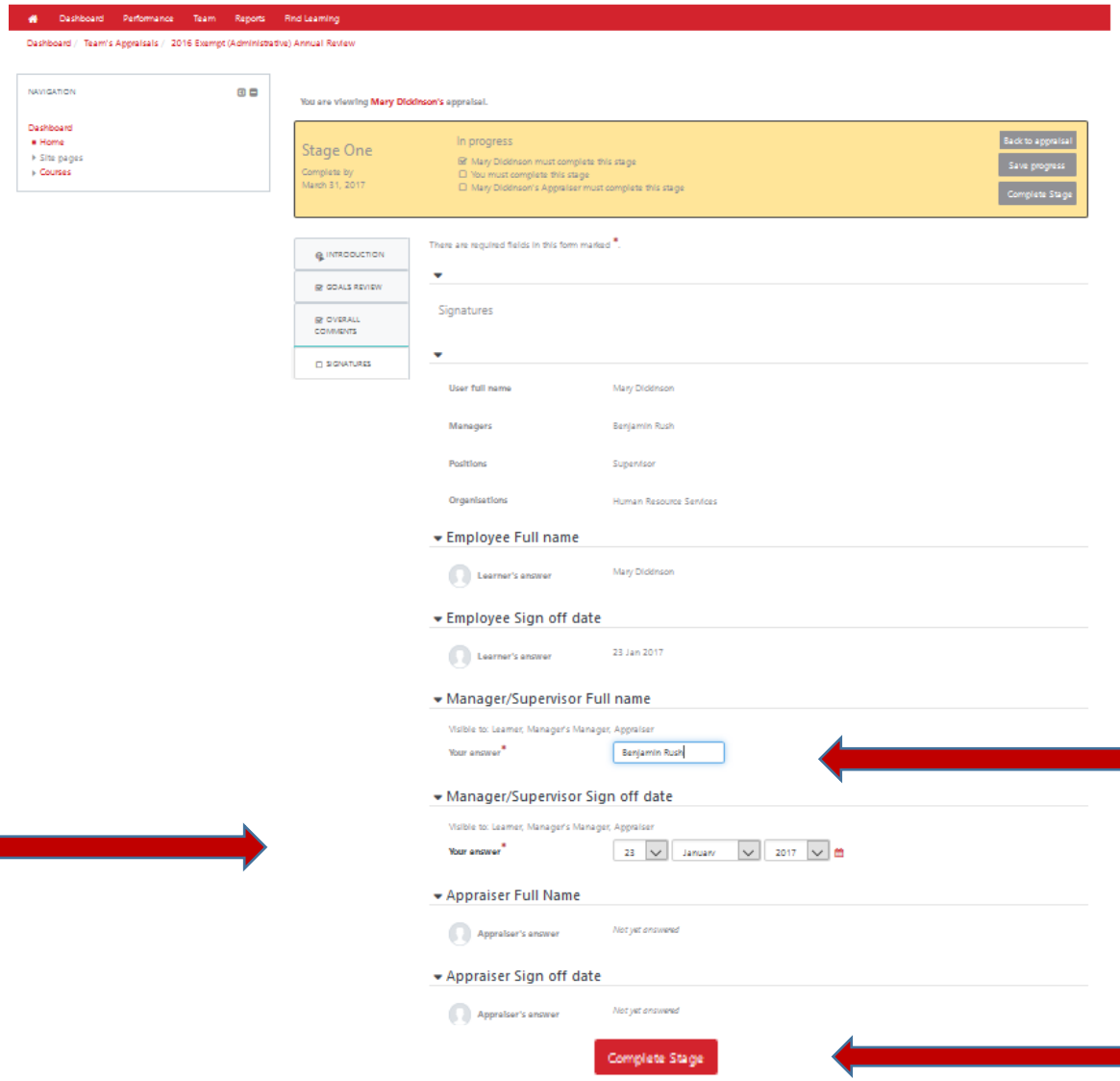


Employee enters his/her overall all comments/summary for the review year

Employee's response

Click "Next"

Signatures

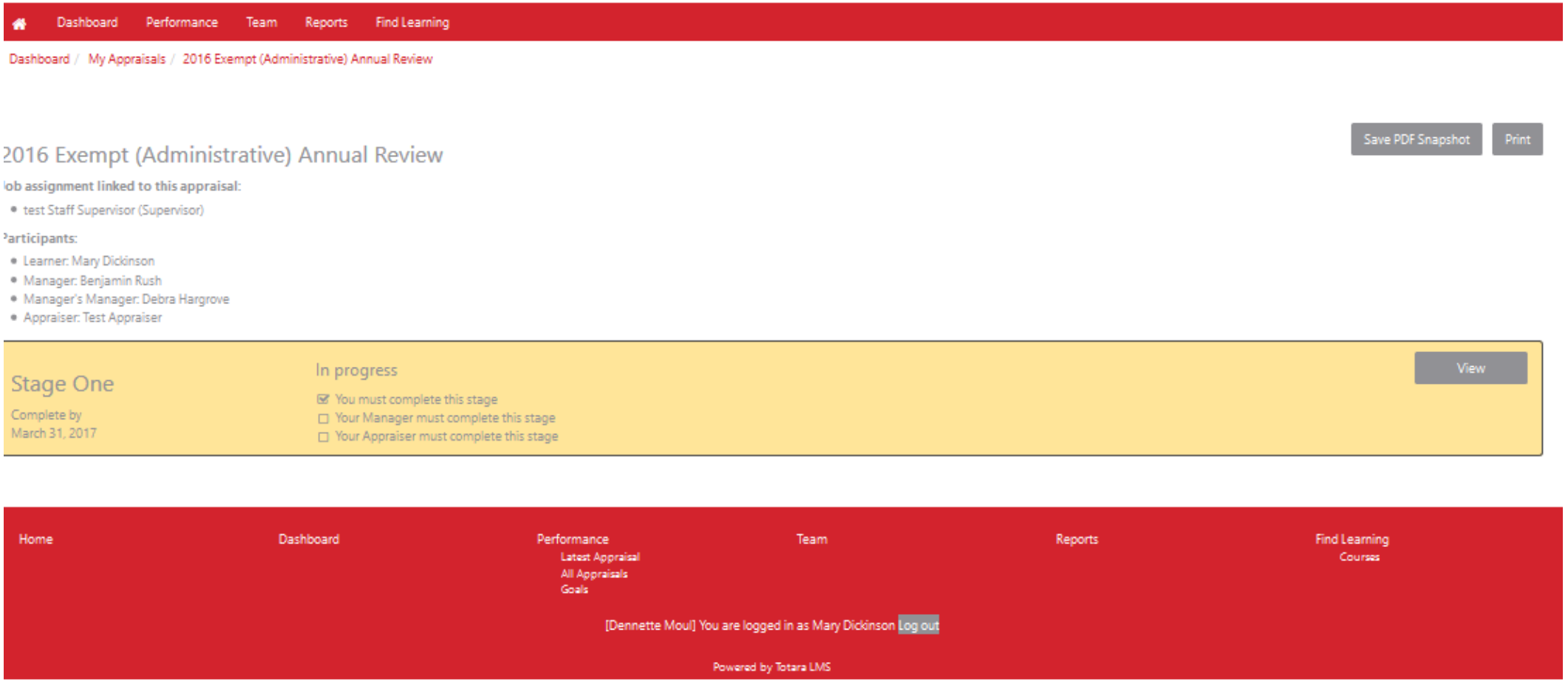


Type in your full name

Ensure date is correct

Click “Complete Stage”

Upon Completion you will be brought to the “progress page”



Congratulations! You have now completed.

BUT WAIT THERE'S MORE!!

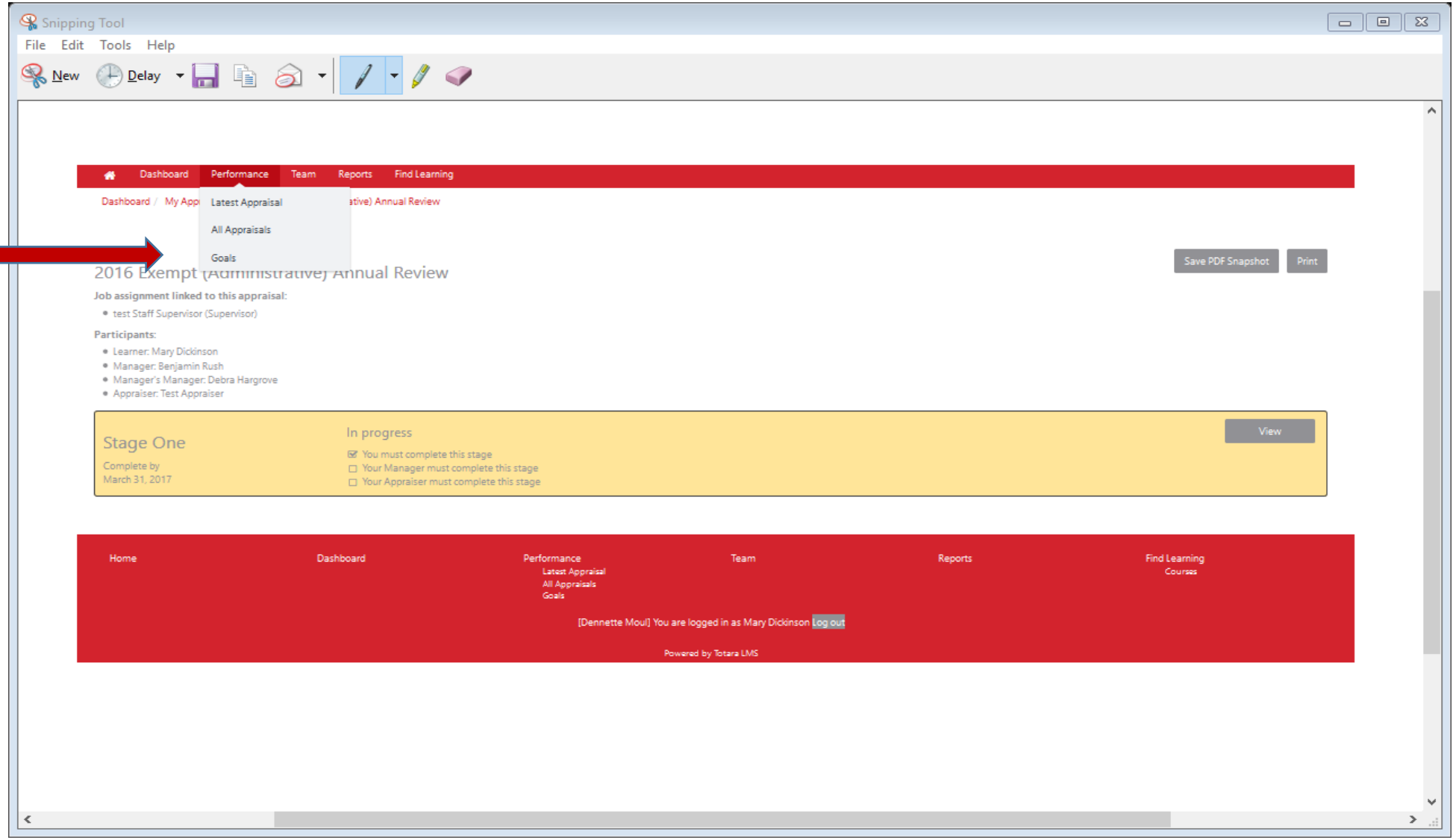
Creating Goals for Next Review Period

Goals should **only** be put into the system upon total completion of the review process!

It is recommended to title goals with the year for easy recognition in the coming months.

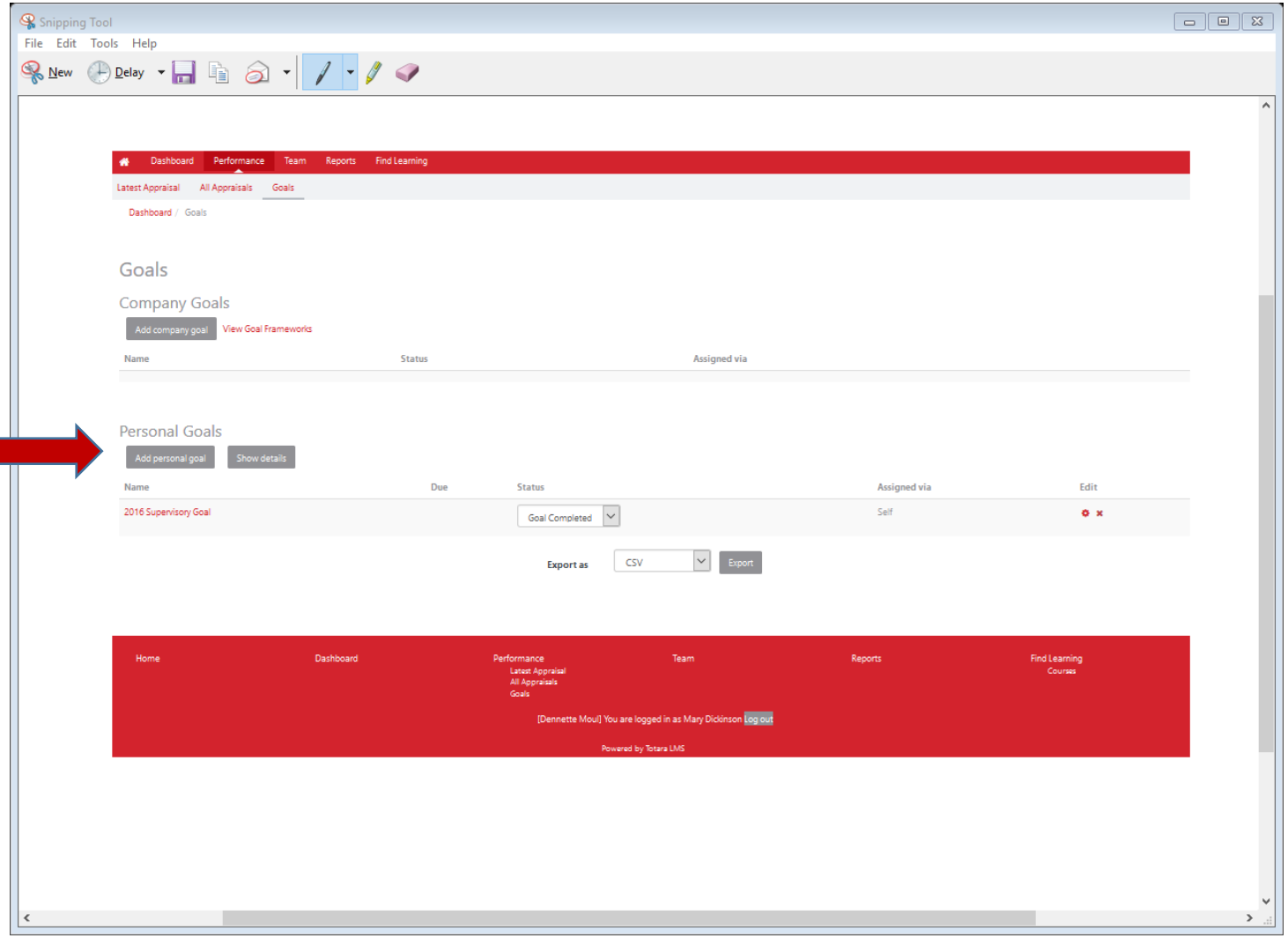
Creating a Goal for Next Review Period

Go to “Performance” and then “Goals”

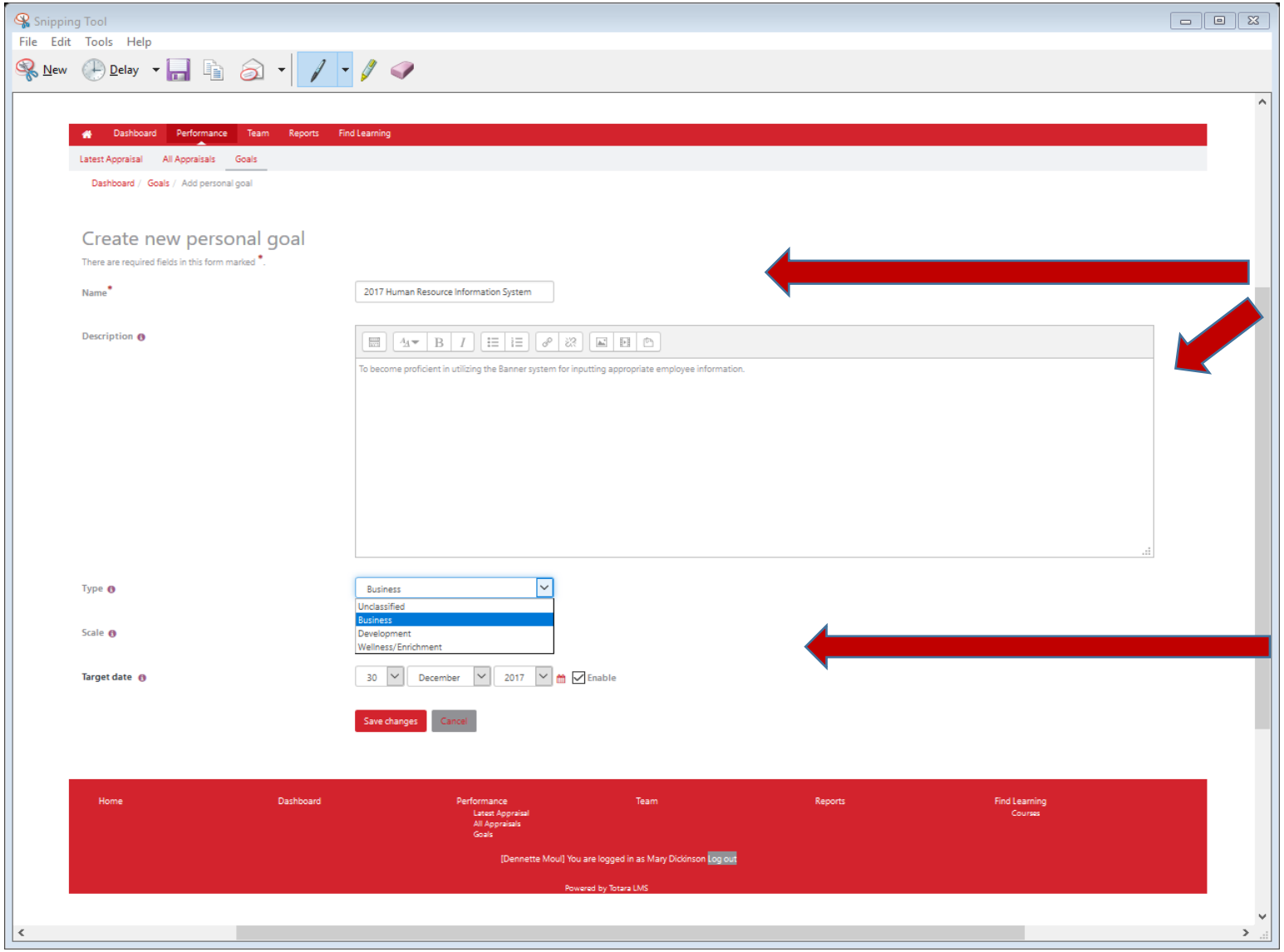


Creating Goals, Continued

Click “Add personal goal”



Creating Goals, continued

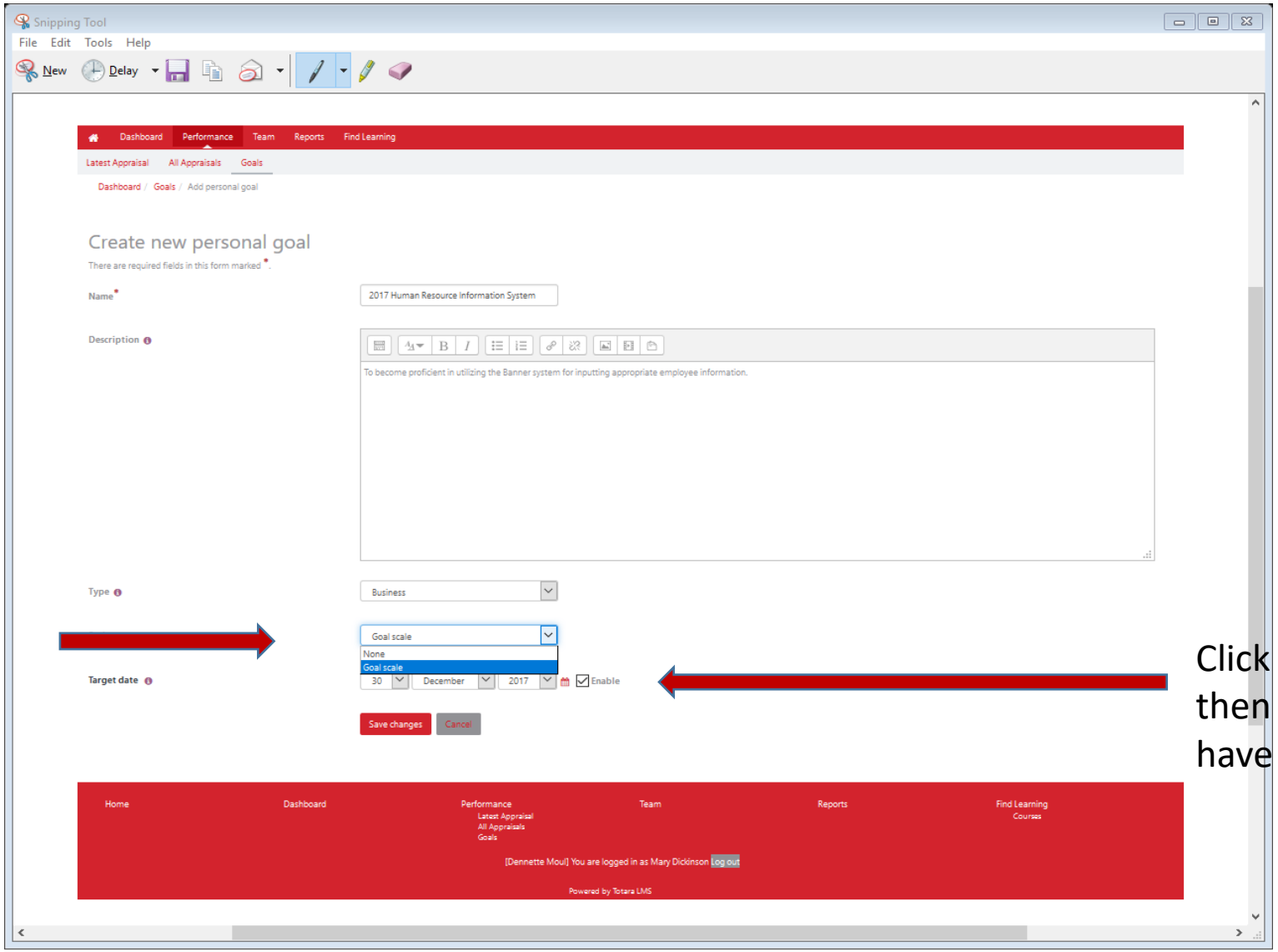


Provide a “Name” and brief “Description” of the goal to be worked on during the upcoming review period.

Choose the type from the drop down list “Business, Development or Wellness/Enrichment”

Creating Goals, continued

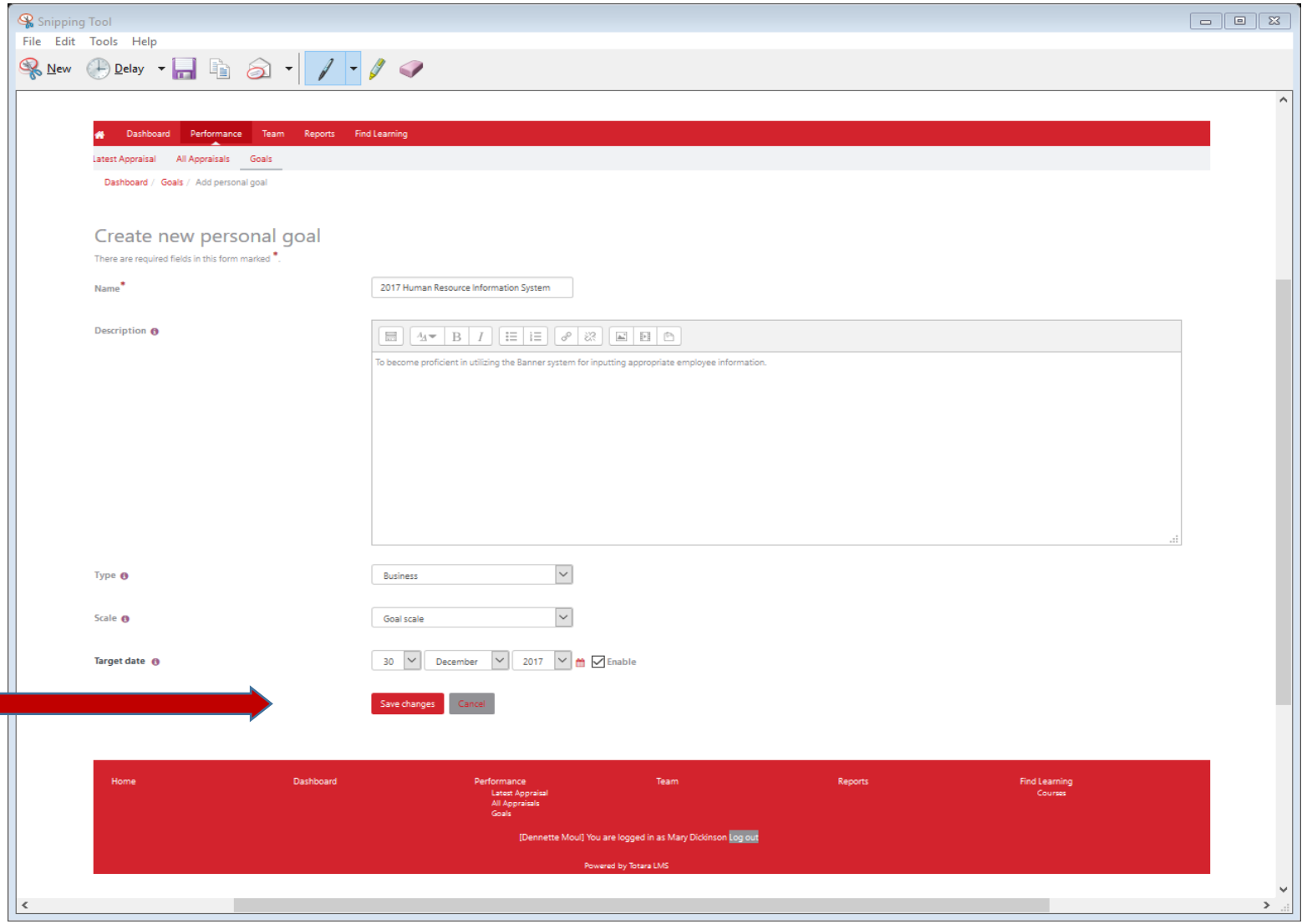
Select “Goal Scale” from the drop downlist.



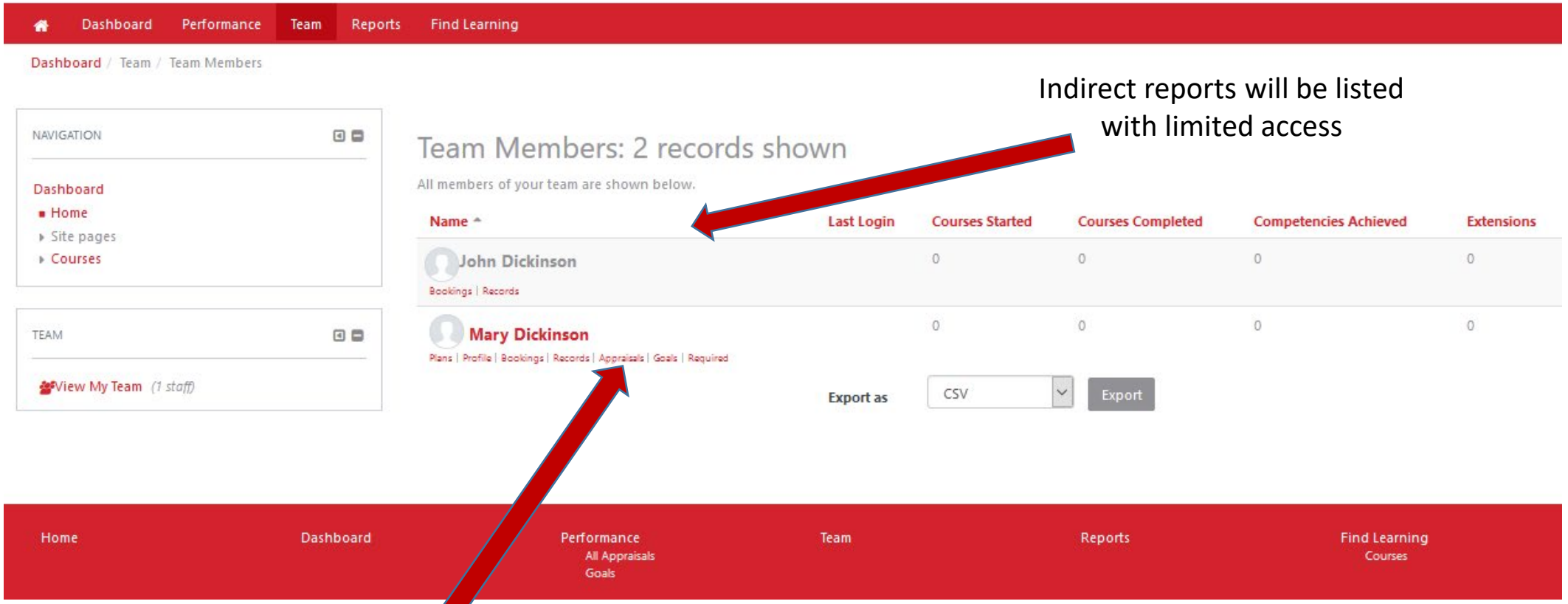
Click on the “Enable” box and then select the date you plan to have the goal completed

Creating Goals, continued

Final step is to click
“Save Changes”



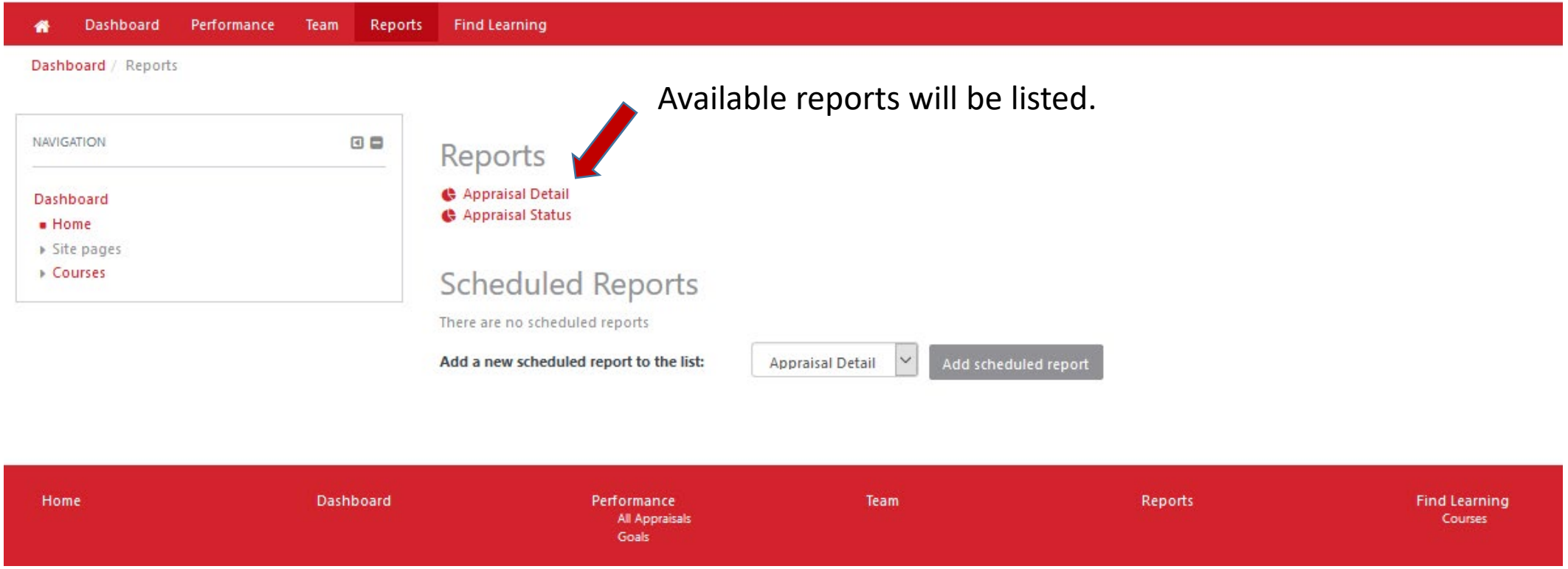
Team Tab



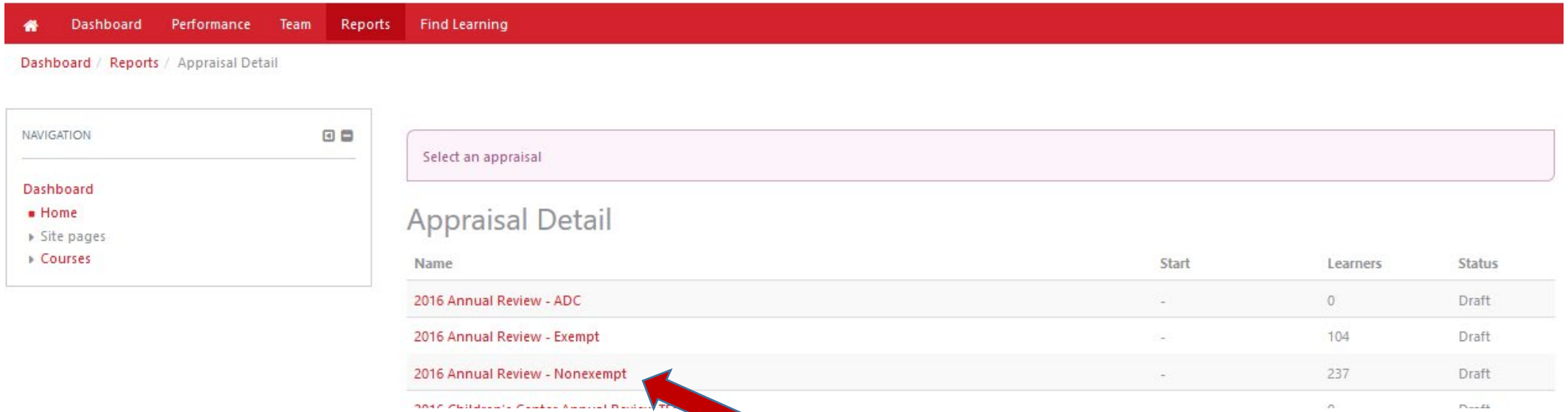
Indirect reports will be listed with limited access

Direct reports will be listed with access to appraisals and goals

Reports

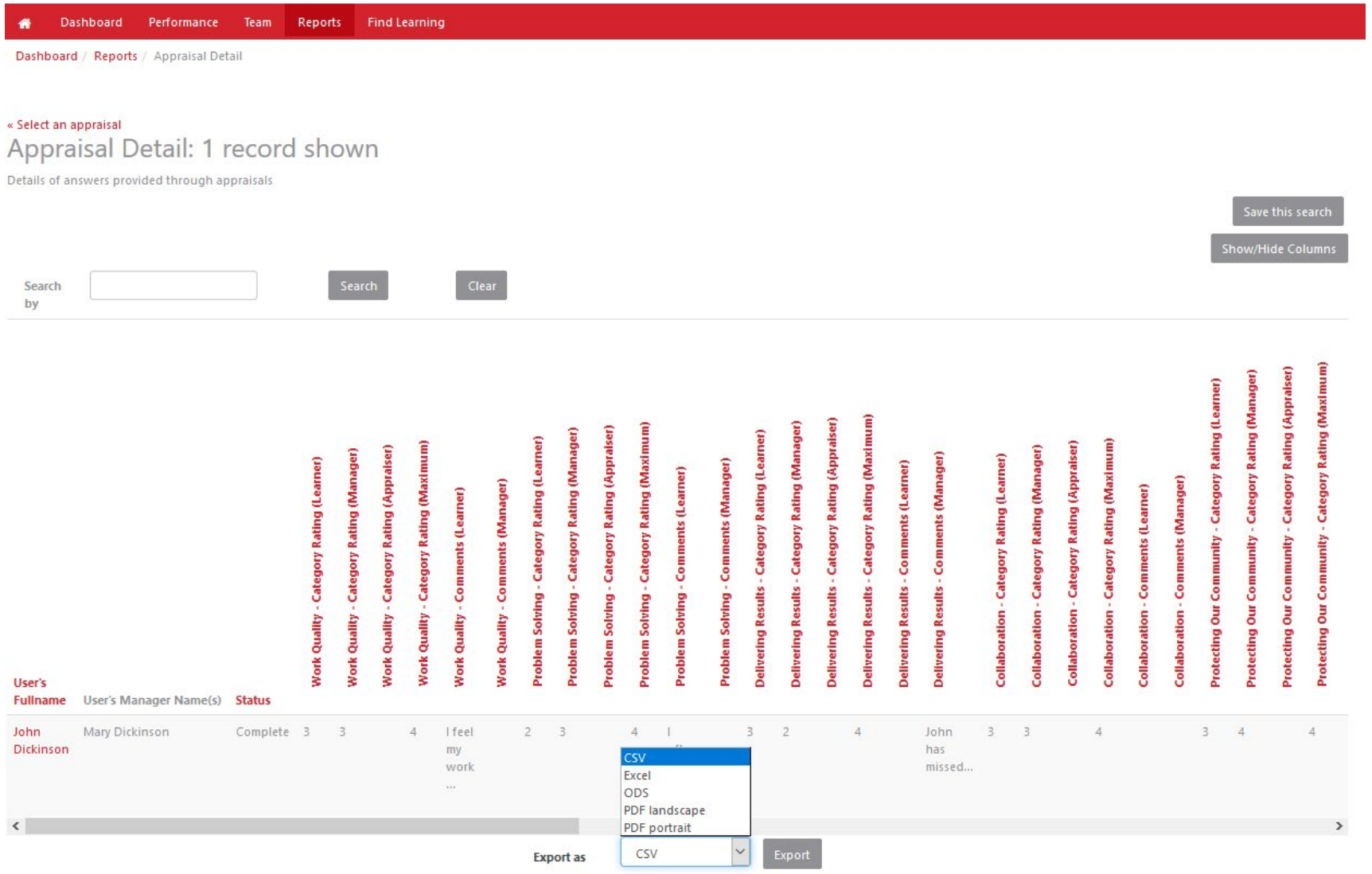

Dashboard
Performance
Team
Reports
Find Learning
Dashboard / Reports
NAVIGATION
Dashboard
Home
Site pages
Courses
Available reports will be listed.
Reports
Appraisal Detail
Appraisal Status
Scheduled Reports
There are no scheduled reports
Add a new scheduled report to the list:
Appraisal Detail
Add scheduled report
Home
Dashboard
Performance
All Appraisals
Goals
Team
Reports
Find Learning
Courses

Reports continued



Select the appraisal you would like to see the detail for your reports

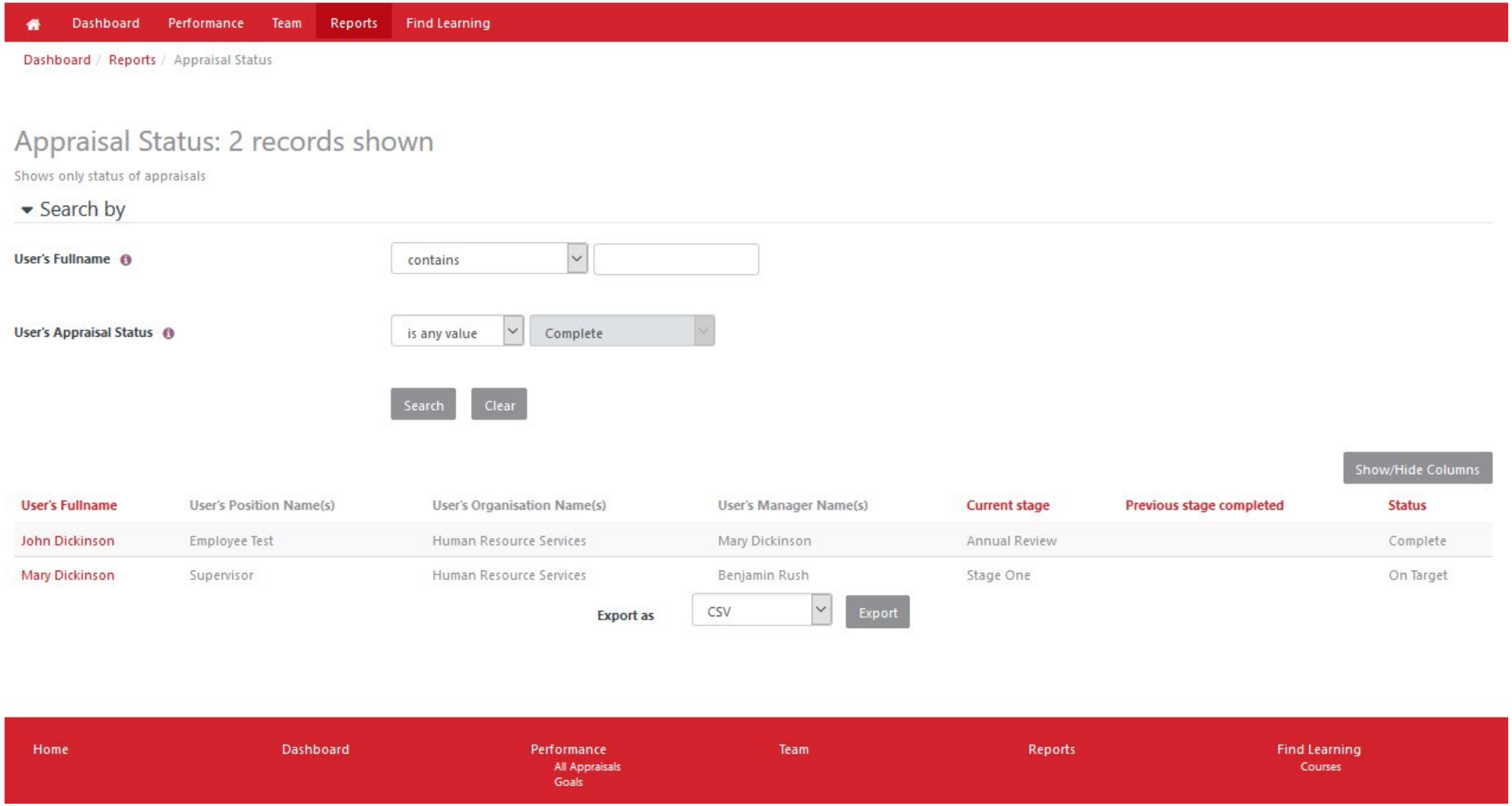
Reports continued



Review within page or export

(have found that excel works best)

Reports continued



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