



Performance Appraisals in Totara

Supervisory Introduction for Exempt Appraisals

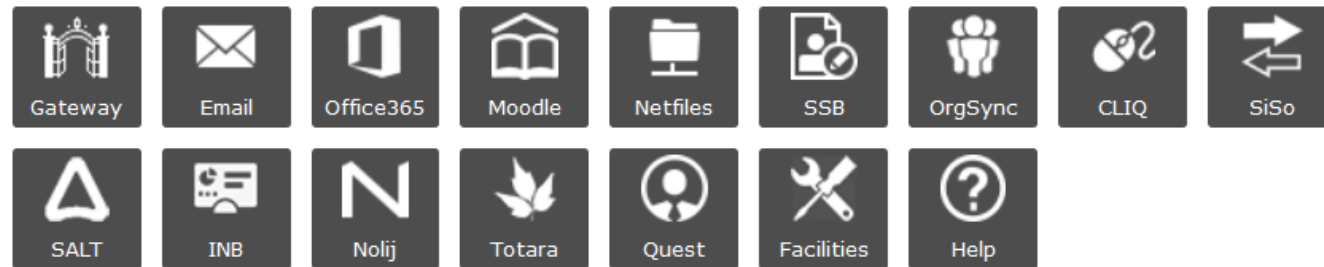
Sign into the Gateway



Gateway: Home

- My Gateway >
- Employees >
- Campus Documents >
- Faculty Meetings >
- Alumni Directory >
- FAS Directory >

APPLICATION LAUNCH PAD



PASSWORD RECOVERY CONFIGURATION

CAMPUS BALANCES

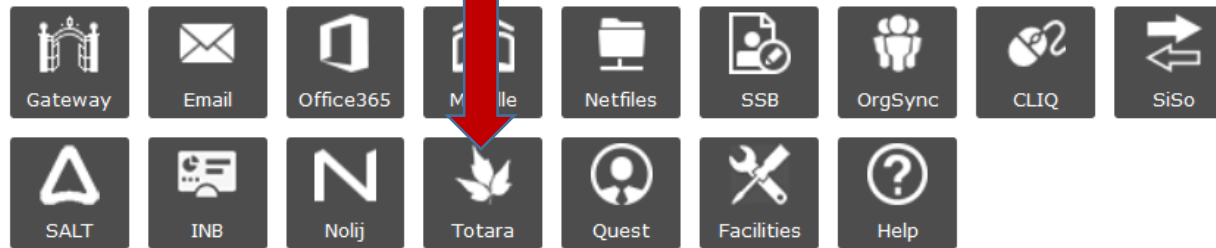
Click on “Totara”



Gateway: Home

- My Gateway >
- Employees >
- Campus Documents >
- Faculty Meetings >
- Alumni Directory >
- FAS Directory >

APPLICATION LAUNCH P...



PASSWORD RECOVERY CONFIGURATION

CAMPUS BALANCES

Go to the "Performance" tab



The screenshot shows a user interface for a Learning Management System (LMS). At the top, a red navigation bar contains four tabs: Home, Dashboard, Performance, and Find Learning. The Performance tab is currently selected. Below the navigation bar, the breadcrumb path reads "Dashboard / My Learning". A "Customise this page" button is located in the top right corner. The main content area is divided into several sections:

- MY LEARNING:** Contains links for Learning Plans, Bookings, and Record of Learning.
- NAVIGATION:** Contains links for Home, Site pages, and Courses.
- CURRENT LEARNING:** Displays a message: "You do not have any current learning. For previously completed learning see your Record of Learning."
- ALERTS:** An empty section.
- LATEST BADGES:** Displays a message: "You have no badges to display".
- UPCOMING EVENTS:** Displays a message: "There are no upcoming events" with links for "Go to calendar..." and "New event...".
- LATEST NEWS:** Displays a message: "(No news has been posted yet)".

At the bottom, a red footer bar contains navigation links for Home, Dashboard, Performance (with sub-links for All Appraisals and Goals), and Find Learning (with sub-link for Courses). The footer also displays the user's name and role: "[Dennette Moul] You are logged in as Test Appraiser" with a "Log out" link. The text "Powered by Totara LMS" is centered at the very bottom.

Go to the “All Appraisals”

The screenshot shows a web application interface with a red header and footer. The header contains navigation links: Home, Dashboard, Performance, Team, Reports, and Find Learning. A dropdown menu is open under 'Performance', showing 'All Appraisals' and 'Goals'. A red arrow points from the 'All Appraisals' link in the dropdown to the 'All Appraisals' page title. Another red arrow points from the text 'Click “As Manager”*' to the 'AS MANAGER' tab. The page title is 'All Appraisals'. Below the title are two tabs: 'AS MANAGER' (selected) and 'AS MANAGER'S MANAGER'. A table displays appraisal data:

Name	Appraisal	Start date	End date	Status
Mary Dickinson	2016 Exempt (Administrative) Annual Review	23 Jan 2017	31 Mar 2017	Active

The footer contains navigation links: Home, Dashboard, Performance (with sub-links 'All Appraisals' and 'Goals'), Team, Reports, and Find Learning (with sub-link 'Courses'). It also shows the user is logged in as Benjamin Rush and is powered by Totara LMS.

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

Performance Appraisal

The screenshot shows a web application interface for performance appraisals. At the top, a red navigation bar contains links for Dashboard, Performance, Team, Reports, and Find Learning. A dropdown menu is open under 'Performance', showing 'All Appraisals' and 'Goals'. Below this, the page title is 'All Appraisals'. There are two tabs: 'AS MANAGER' (selected) and 'AS MANAGER'S MANAGER'. A table lists appraisal records. A red arrow points to the 'Employee/Appraisal' column of the first row. The footer contains navigation links, a user login status, and a 'Powered by Totara LMS' notice.

Click on
"Employee/Appraisal"

Name	Appraisal	Start date	End date	Status
Mary Dickinson	2016 Exempt (Administrative) Annual Review	23 Jan 2017	31 Mar 2017	Active

Home Dashboard Performance All Appraisals Goals Team Reports Find Learning Courses

[Dennette Mou] You are logged in as Benjamin Rush [log out](#)

Powered by Totara LMS

Next, click “Start”

The screenshot shows a web browser window titled "Snipping Tool" with a menu bar (File, Edit, Tools, Help) and a toolbar. The main content area has a red navigation bar with links: Dashboard, Performance, Team, Reports, Find Learning. Below this is a breadcrumb trail: Dashboard / My Appraisals / 2016 Exempt (Administrative) Annual Review. The main heading is "2016 Exempt (Administrative) Annual Review" with "Save PDF Snapshot" and "Print" buttons. The "Job assignment linked to this appraisal:" section lists "test Staff Supervisor (Supervisor)". The "Participants:" section lists "Learner: Mary Dickinson", "Manager: Role currently empty", "Manager's Manager: Role currently empty", and "Appraiser: Test Appraiser". A warning message states: "Warning: there are missing roles which may prevent this appraisal being completed." Below this is a yellow box for "Stage One" with the status "In progress" and a "Start" button. The "Complete by" date is "January 31, 2017". Two checkboxes are present: "You must complete this stage" and "Your Appraiser must complete this stage". A red arrow points to the "Start" button. The bottom navigation bar includes links for Home, Dashboard, Performance (Latest Appraisal, All Appraisals, Goals), Team, Reports, and Find Learning (Courses). The footer shows "[Dennette Mou] You are logged in as Mary Dickinson Log out" and "Powered by Totara LMS".

First page of the appraisal

The screenshot shows a web application window titled 'Snipping Tool'. The application has a red navigation bar with links for 'Dashboard', 'Performance', 'Team', 'Reports', and 'Find Learning'. Below this, the breadcrumb trail reads 'Dashboard / My Appraisals / 2016 Exempt (Administrative) Annual Review'. A left-hand navigation menu is visible, containing 'Dashboard', 'Home', 'Site pages', and 'Courses'. The main content area features a yellow 'Stage One' header with the text 'In progress' and a 'Complete by' date of 'March 31, 2017'. To the right of this header are three buttons: 'Back to appraisal', 'Save progress', and 'Complete Stage'. Below the header is a section titled 'Dickinson' with a dropdown arrow. Underneath, a table lists user details: 'User full name' (Mary Dickinson), 'Managers' (Benjamin Rush), 'Positions' (Supervisor), and 'Organisations' (Human Resource Services). A list of instructions follows, including: 'Complete this review and submit to your supervisor prior to your meeting.', 'You and your supervisor should discuss accomplishments and areas for development during the review.', 'The section for goal setting is provided to promote discussion during the review. You and your supervisor should identify goals for the next review period, discuss development needs or specify corrective action when appropriate. Once you and your supervisor have set goals, you can expect to conduct a self-assessment of progress toward these goals and meet with your supervisor to discuss prior to the next review.', and 'You and your supervisor will electronically sign the form when the review is completed.' At the bottom center, there is a red 'Next' button. A large red arrow points from the right side of the screen towards the 'Next' button, with the text 'Click Next' above it.

Click Next

Goal Review

Dashboard Performance Team Find Learning Record of Learning Reports

Home / Team's Appraisals / 2017 Exempt (Administrative) Annual Performance Appraisal TEMPLATE

NAVIGATION

ADMINISTRATION

Site administration

Search in settings Go

You are viewing **Totara Test User's** appraisal.

Annual Performance Appraisal In progress

Back to appraisal

Save progress

Complete Stage

INTRODUCTION

GOALS REVIEW

OVERALL COMMENTS

SIGNATURES

Please Review Your Goals

Collapse all

Choose goals to review

2017 Goal Example

this is an example of where a goal would be inserted to the appraisal.

Current goal status Goal Assigned

Visible to: Learner, Manager's Manager, Appraiser

Your answer

Learner's answer testing

Appraiser's answer Not yet answered

Next

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

Employee's response

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

Provide your summary of goal

Overall Comments

Dashboard / Team's Appraisals / 2016 Exempt (Administrative) Annual Review

NAVIGATION

- Dashboard
- Home
- Site pages
- Courses

You are viewing **Mary Dickinson's** appraisal.

Stage One In progress

Complete by March 31, 2017

- Mary Dickinson must complete this stage
- You must complete this stage
- Mary Dickinson's Appraiser must complete this stage

Buttons: Back to appraisal, Save progress, Complete Stage

INTRODUCTION

GOALS REVIEW

OVERALL COMMENTS

SIGNATURES

There are required fields in this form marked *

Overall comments

Visible to: Learner, Manager's Manager, Appraiser

Your answer *

Rich text editor toolbar: Bold, Italic, Underline, Bulleted list, Numbered list, Link, Unlink, Image, Video, Print, Save

Learner's answer

I feel as though 2016 was a very productive year.

I was given several opportunities to grow as a supervisor. My primary goal was to become more comfortable in dealing with employee performance and feedback. I feel that the course I have been able to take advantage of and the real life situations I found within the department as certainly given me the opportunities I was seeking.

I hope to continue to grow within my role and would like to be considered in the coming years for the Management development Program.

Next

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



Employee's response



Click "Next"

Signatures

Dashboard Performance Team Reports Rnd Learning

Dashboard / Team's Appraisals / 2016 Exempt (Administrative) Annual Review

NAVIGATION

- Dashboard
- Home
- Site pages
- Courses

You are viewing **Mary Didkinson's** appraisal.

Stage One In progress

Complete by March 31, 2017

- Mary Didkinson must complete this stage
- You must complete this stage
- Mary Didkinson's Appraiser must complete this stage

Back to appraisal Save progress Complete Stage

INTRODUCTION GOALS REVIEW OVERALL COMMENTS SIGNATURES

There are required fields in this form marked *

Signatures

User full name Mary Didkinson

Managers Benjamin Rush

Positions Supervisor

Organisations Human Resource Services

Employee Full name

Learner's answer Mary Didkinson

Employee Sign off date

Learner's answer 23 Jan 2017

Manager/Supervisor Full name

Visible to: Learner, Manager's Manager, Appraiser

Your answer Benjamin Rush

Manager/Supervisor Sign off date

Visible to: Learner, Manager's Manager, Appraiser

Your answer 23 January 2017

Appraiser Full Name

Appraiser's answer Not yet answered

Appraiser Sign off date

Appraiser's answer Not yet answered

Complete Stage

Type in your full name

Ensure date is correct

Click "Complete Stage"

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

The screenshot displays a user interface for an annual review process. At the top, a red navigation bar contains links for Home, Dashboard, Performance, Team, Reports, and Find Learning. Below this, a breadcrumb trail reads: Dashboard / My Appraisals / 2016 Exempt (Administrative) Annual Review. The main content area features the title '2016 Exempt (Administrative) Annual Review' and two buttons: 'Save PDF Snapshot' and 'Print'. A section titled 'Job assignment linked to this appraisal:' lists 'test Staff Supervisor (Supervisor)'. Below that, 'Participants:' lists 'Learner: Mary Dickinson', 'Manager: Benjamin Rush', 'Manager's Manager: Debra Hargrove', and 'Appraiser: Test Appraiser'. A yellow box highlights 'Stage One' with a status of 'In progress' and a 'View' button. It includes a 'Complete by' date of 'March 31, 2017' and three checklist items: 'You must complete this stage' (checked), 'Your Manager must complete this stage' (unchecked), and 'Your Appraiser must complete this stage' (unchecked). The bottom red navigation bar includes 'Home', 'Dashboard', 'Performance' (with sub-links for Latest Appraisal, All Appraisals, and Goals), 'Team', 'Reports', and 'Find Learning Courses'. A login status message reads: '[Denette Moul] You are logged in as Mary Dickinson Log out'. The footer text is 'Powered by Totara LMS'.

Dashboard Performance Team Reports Find Learning

Dashboard / My Appraisals / 2016 Exempt (Administrative) Annual Review

2016 Exempt (Administrative) Annual Review

Save PDF Snapshot Print

Job assignment linked to this appraisal:

- test Staff Supervisor (Supervisor)

Participants:

- Learner: Mary Dickinson
- Manager: Benjamin Rush
- Manager's Manager: Debra Hargrove
- Appraiser: Test Appraiser

Stage One

In progress

Complete by
March 31, 2017

- You must complete this stage
- Your Manager must complete this stage
- Your Appraiser must complete this stage

View

Home Dashboard Performance Team Reports Find Learning Courses

Latest Appraisal
All Appraisals
Goals

[Denette Moul] You are logged in as Mary Dickinson Log out

Powered by Totara LMS

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"



A screenshot of a web application interface, likely a learning management system (LMS), showing the 'Performance' menu. The interface is displayed within a 'Snipping Tool' window. The 'Performance' menu is open, showing options: 'Latest Appraisal', 'All Appraisals', and 'Goals'. A red arrow points from the text 'Go to "Performance" and then "Goals"' to the 'Goals' option. The main content area shows a '2016 Exempt (Administrative) Annual Review' with a 'View' button. The footer includes navigation links (Home, Dashboard, Performance, Team, Reports, Find Learning Courses) and a login status: '[Dennette Moul] You are logged in as Mary Dickinson Log out'. The page is powered by Totara LMS.

Creating Goals, Continued

Click "Add personal goal"



Snipping Tool

File Edit Tools Help

New Delay [Icons]

Dashboard Performance Team Reports Find Learning

Latest Appraisal All Appraisals Goals

Dashboard / Goals

Goals

Company Goals

[Add company goal](#) [View Goal Frameworks](#)

Name	Status	Assigned via
------	--------	--------------

Personal Goals

[Add personal goal](#) [Show details](#)

Name	Due	Status	Assigned via	Edit
2016 Supervisory Goal		Goal Completed	Self	✖

Export as: [Export](#)

Home Dashboard Performance Latest Appraisal All Appraisals Goals Team Reports Find Learning Courses

[Denette Mou] You are logged in as Mary Dickinson [Log out](#)

Powered by Totara LMS

Creating Goals, continued

The screenshot shows a web application interface for creating a new personal goal. The form is titled "Create new personal goal" and includes the following fields:

- Name:** A text input field containing "2017 Human Resource Information System".
- Description:** A rich text editor containing the text "To become proficient in utilizing the Banner system for inputting appropriate employee information.".
- Type:** A dropdown menu with options: Business, Unclassified, Business, Development, and Wellness/Enrichment. The "Business" option is selected.
- Scale:** A dropdown menu.
- Target date:** A date selector showing "30" days, "December" month, and "2017" year, with an "Enable" checkbox checked.

At the bottom of the form, there are "Save changes" and "Cancel" buttons. The footer of the application includes navigation links (Home, Dashboard, Performance, Team, Reports, Find Learning) and a login status message: "[Denette Moul] You are logged in as Mary Dickinson [log out](#)".

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

The screenshot shows a web application window titled 'Snipping Tool' with a menu bar (File, Edit, Tools, Help) and a toolbar. The main content area has a red navigation bar with 'Dashboard', 'Performance', 'Team', 'Reports', and 'Find Learning'. Below this is a sub-navigation bar with 'Latest Appraisal', 'All Appraisals', and 'Goals'. The breadcrumb trail is 'Dashboard / Goals / Add personal goal'. The main heading is 'Create new personal goal' with a note: 'There are required fields in this form marked *'. The form fields are: 'Name' (2017 Human Resource Information System), 'Description' (To become proficient in utilizing the Banner system for inputting appropriate employee information.), 'Type' (Business), 'Goal scale' (dropdown menu with options: None, Goal scale), 'Target date' (30, December, 2017), and an 'Enable' checkbox. At the bottom are 'Save changes' and 'Cancel' buttons. A footer contains navigation links (Home, Dashboard, Performance, Team, Reports, Find Learning Courses), user information ([Denette Moul] You are logged in as Mary Dickinson Log out), and 'Powered by Tetara LMS'.

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

The screenshot shows a web application window titled 'Snipping Tool' with a menu bar (File, Edit, Tools, Help) and a toolbar. The application interface has a red header with navigation tabs: Dashboard, Performance, Team, Reports, and Find Learning. Below the header, there are sub-tabs: Latest Appraisal, All Appraisals, and Goals. The breadcrumb trail reads 'Dashboard / Goals / Add personal goal'. The main content area is titled 'Create new personal goal' and includes a note: 'There are required fields in this form marked *'. The form fields are: Name (text input with value '2017 Human Resource Information System'), Description (rich text editor with value 'To become proficient in utilizing the Banner system for inputting appropriate employee information.'), Type (dropdown menu with value 'Business'), Scale (dropdown menu with value 'Goal scale'), and Target date (date picker with value '30 December 2017' and an 'Enable' checkbox). At the bottom of the form are 'Save changes' and 'Cancel' buttons. A red arrow points from the left towards the 'Save changes' button. The footer of the application is red and contains navigation links: Home, Dashboard, Performance (with sub-links: Latest Appraisal, All Appraisals, Goals), Team, Reports, and Find Learning (with sub-link: Courses). It also displays the user information: '[Denette Mou] You are logged in as Mary Dickinson Log out' and 'Powered by Totara LMS'.

Final step is to click
“Save Changes”

Team Tab

The screenshot shows a LMS interface with a red navigation bar at the top containing 'Dashboard', 'Performance', 'Team', 'Reports', and 'Find Learning'. Below the navigation bar, the breadcrumb path is 'Dashboard / Team / Team Members'. On the left, there are two sidebars: 'NAVIGATION' with links for 'Home', 'Site pages', and 'Courses'; and 'TEAM' with a 'View My Team (1 staff)' button. The main content area is titled 'Team Members: 2 records shown' and contains a table of team members. The table has columns for 'Name', 'Last Login', 'Courses Started', 'Courses Completed', 'Competencies Achieved', and 'Extensions'. Two members are listed: John Dickinson and Mary Dickinson. Below the table is an 'Export as' section with a dropdown menu set to 'CSV' and an 'Export' button. At the bottom, a red footer bar contains navigation links for 'Home', 'Dashboard', 'Performance' (with sub-links for 'All Appraisals' and 'Goals'), 'Team', 'Reports', and 'Find Learning' (with sub-link for 'Courses').

Indirect reports will be listed with limited access

Name	Last Login	Courses Started	Courses Completed	Competencies Achieved	Extensions
John Dickinson Bookings Records		0	0	0	0
Mary Dickinson Plans Profile Bookings Records Appraisals Goals Required		0	0	0	0

Export as:

Direct reports will be listed with access to appraisals and goals

Reports

Dashboard / Reports

NAVIGATION

- Dashboard
 - Home
 - Site pages
 - Courses

Reports

- Appraisal Detail
- Appraisal Status

Scheduled Reports

There are no scheduled reports

Add a new scheduled report to the list:

Appraisal Detail

Available reports will be listed.

Home Dashboard Performance
All Appraisals
Goals Team Reports Find Learning
Courses

Reports continued

Dashboard Performance Team **Reports** Find Learning

Dashboard / Reports / Appraisal Detail

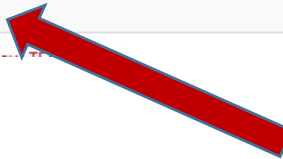
NAVIGATION

- Dashboard
 - Home
 - Site pages
 - Courses

Select an appraisal

Appraisal Detail

Name	Start	Learners	Status
2016 Annual Review - ADC	-	0	Draft
2016 Annual Review - Exempt	-	104	Draft
2016 Annual Review - Nonexempt	-	237	Draft
2016 Children's State Annual Review	-	0	Draft



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

Reports continued

Dashboard / Reports / Appraisal Detail

« Select an appraisal

Appraisal Detail: 1 record shown

Details of answers provided through appraisals

Save this search

Show/Hide Columns

Search by Search Clear

User's Fullname	User's Manager Name(s)	Status	Work Quality - Category Rating (Learner)	Work Quality - Category Rating (Manager)	Work Quality - Category Rating (Appraiser)	Work Quality - Category Rating (Maximum)	Work Quality - Comments (Learner)	Work Quality - Comments (Manager)	Problem Solving - Category Rating (Learner)	Problem Solving - Category Rating (Manager)	Problem Solving - Category Rating (Appraiser)	Problem Solving - Category Rating (Maximum)	Problem Solving - Comments (Learner)	Problem Solving - Comments (Manager)	Delivering Results - Category Rating (Learner)	Delivering Results - Category Rating (Manager)	Delivering Results - Category Rating (Appraiser)	Delivering Results - Category Rating (Maximum)	Delivering Results - Comments (Learner)	Delivering Results - Comments (Manager)	Collaboration - Category Rating (Learner)	Collaboration - Category Rating (Manager)	Collaboration - Category Rating (Appraiser)	Collaboration - Category Rating (Maximum)	Collaboration - Comments (Learner)	Collaboration - Comments (Manager)	Protecting Our Community - Category Rating (Learner)	Protecting Our Community - Category Rating (Manager)	Protecting Our Community - Category Rating (Appraiser)	Protecting Our Community - Category Rating (Maximum)
John Dickinson	Mary Dickinson	Complete	3	3	4		I feel my work ...		2	3		4	1		3	2		4		John has missed...	3	3	4			3	4	4		

Export as Export

Review within page or export (have found that excel works best)

Reports continued

Dashboard Performance Team **Reports** Find Learning

Dashboard / Reports / Appraisal Status

Appraisal Status: 2 records shown

Shows only status of appraisals

▼ Search by

User's Fullname ⓘ

contains

User's Appraisal Status ⓘ

is any value

Complete

Search

Clear

Show/Hide Columns

User's Fullname	User's Position Name(s)	User's Organisation Name(s)	User's Manager Name(s)	Current stage	Previous stage completed	Status
John Dickinson	Employee Test	Human Resource Services	Mary Dickinson	Annual Review		Complete
Mary Dickinson	Supervisor	Human Resource Services	Benjamin Rush	Stage One		On Target

Export as

CSV

Export

Home

Dashboard

Performance
All Appraisals
Goals

Team

Reports

Find Learning
Courses

For assistance contact:

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