



Performance Appraisals in Totara

Supervisory Introduction for Nonexempt Appraisals

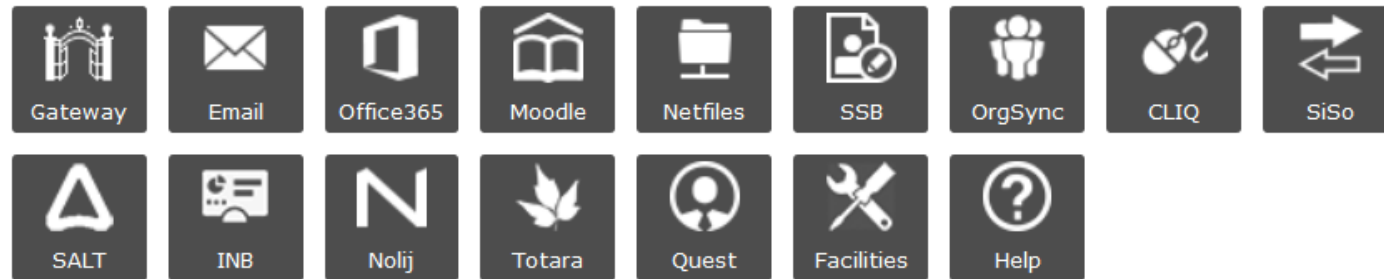
Sign into the Gateway



Gateway: Home

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

APPLICATION LAUNCH PAD



PASSWORD RECOVERY CONFIGURATION

CAMPUS BALANCES

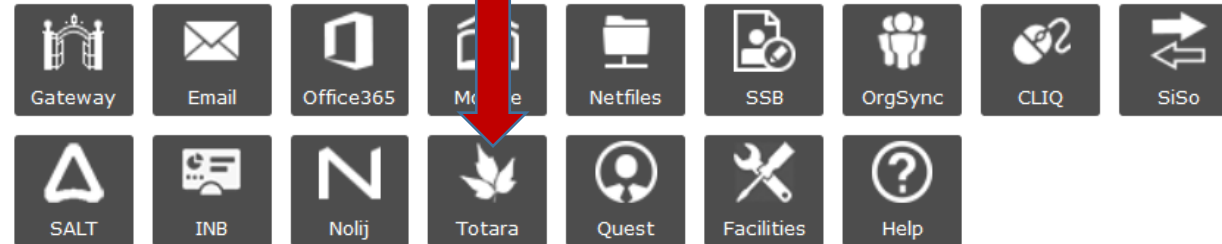
Click on “Totara”



Gateway: Home

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

APPLICATION LAUNCH PAD



PASSWORD RECOVERY CONFIGURATION

CAMPUS BALANCES

Go to the "Performance" tab

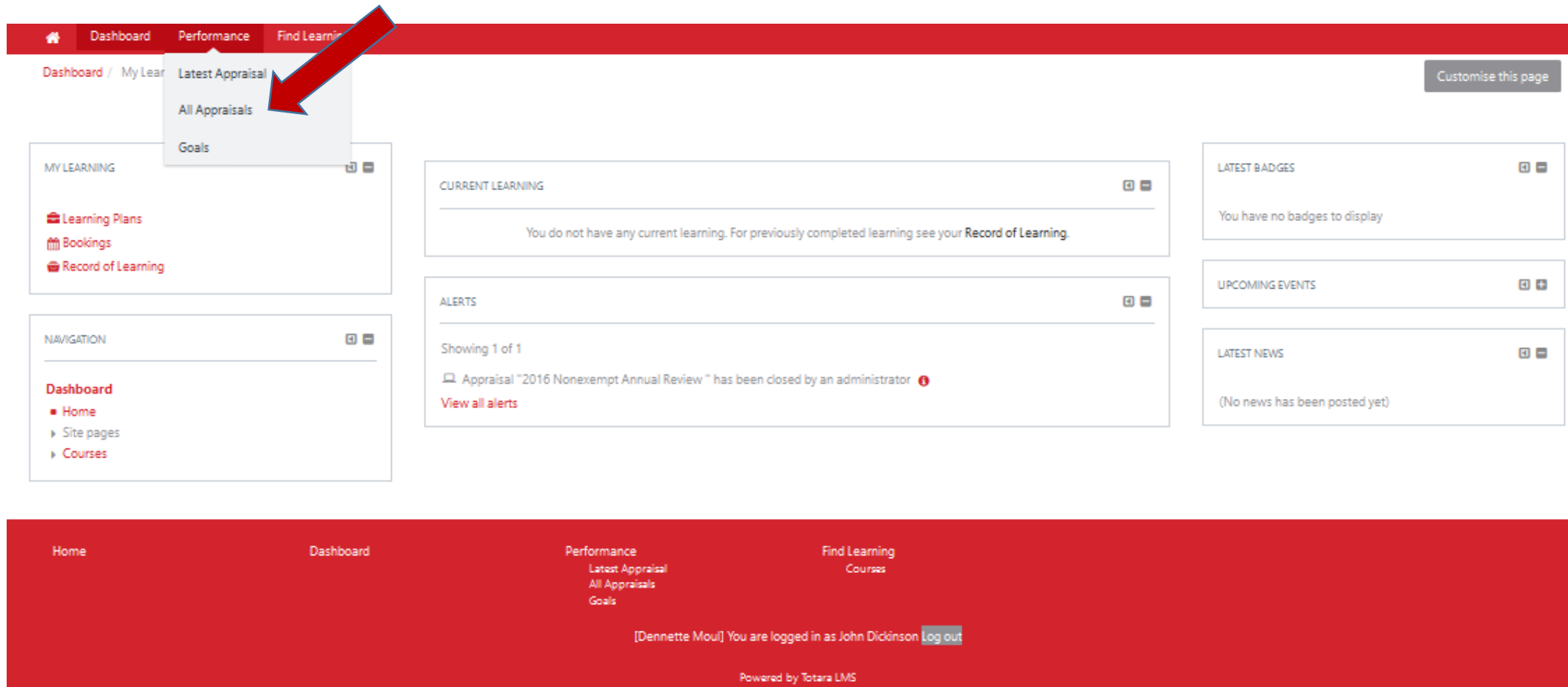


The screenshot shows a dashboard interface with a red navigation bar at the top. The 'Performance' tab is selected and highlighted. Below the navigation bar, the breadcrumb 'Dashboard / My Learning' is visible on the left, and a 'Customise this page' button is on the right. The main content area is divided 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:** A message stating: "You do not have any current learning. For previously completed learning see your Record of Learning."
- ALERTS:** Shows one alert: "Appraisal '2016 Nonexempt Annual Review' has been closed by an administrator" with a red information icon and a link to "View all alerts".
- LATEST BADGES:** A message stating: "You have no badges to display".
- UPCOMING EVENTS:** An empty section.
- LATEST NEWS:** A message stating: "(No news has been posted yet)".

The footer is a red bar containing navigation links: Home, Dashboard, Performance (with sub-links: Latest Appraisal, All Appraisals, Goals), and Find Learning (with sub-link: Courses). It also includes a user status message: "[Dennette Moul] You are logged in as John Dickinson Log out" and the text "Powered by Totara LMS".

Click “All Appraisals”



The screenshot shows a user interface for a Learning Management System (LMS). At the top, there is a red navigation bar with the following tabs: Home, Dashboard, Performance, and Find Learning. Below this, the breadcrumb path is "Dashboard / My Learning". A red arrow points to the "All Appraisals" option in a dropdown menu under the "Performance" tab. The main content area is divided into several sections:

- MY LEARNING:** Includes links for Learning Plans, Bookings, and Record of Learning.
- NAVIGATION:** Includes links for Home, Site pages, and Courses.
- CURRENT LEARNING:** A message stating "You do not have any current learning. For previously completed learning see your Record of Learning."
- ALERTS:** Shows one alert: "Appraisal '2016 Nonexempt Annual Review' has been closed by an administrator". A link "View all alerts" is provided.
- LATEST BADGES:** A message stating "You have no badges to display".
- UPCOMING EVENTS:** A section with a plus icon, currently empty.
- LATEST NEWS:** A message stating "(No news has been posted yet)".

At the bottom, there is a red footer bar containing the following information:

- Home
- Dashboard
- Performance
 - Latest Appraisal
 - All Appraisals
 - Goals
- Find Learning
 - Courses

[Denette Moul] You are logged in as John Dickinson [Log out](#)

Powered by Totara LMS

All Appraisals – “As Manager”

Dashboard / Team's Appraisals

All Appraisals

MY APPRAISALS AS MANAGER

Name	Appraisal	Start date	End date	Status
John Dickinson	2016 Nonexempt Annual Review	23 Jan 2017	31 Mar 2017	Active

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

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

Powered by Totara LMS

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

Next, click “Start”

Dashboard / Team's Appraisals / 2016 Nonexempt Annual Review

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

2016 Nonexempt Annual Review

Save PDF Snapshot Print

Job assignment linked to this appraisal:

- test HR adm assist (Admin Asst HR Services)

Participants:

- Learner: John Dickinson
- Manager: Mary Dickinson
- Manager's Manager: Benjamin Rush
- Appraiser: Role currently empty

Warning: there are missing roles which may prevent this appraisal being completed.

- Appraiser

Annual Review In progress Start

Complete by
March 31, 2017

- John Dickinson must complete this stage
- You must complete this stage
- John Dickinson's Manager's Manager must complete this stage

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

[Dennette Moul] You are logged in as Mary Dickinson [Log out](#)

Powered by Totara LMS

First page of the appraisal

Dashboard Performance Team Reports Find Learning

Dashboard Team's Appraisals 2016 Nonexempt Annual Review

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

Annual Review In progress

Complete by: March 31, 2017

- John Dickinson must complete this stage
- You must complete this stage
- John Dickinson's Manager's Manager must complete this stage

[Back to appraisal](#)
[Save progress](#)
[Complete Stage](#)

- INTRODUCTION
- REVIEW OF PERFORMANCE
- REVIEW OF PERFORMANCE - CONTINUED
- GOALS REVIEW
- PERFORMANCE SUMMARY PER CATEGORY
- OVERALL COMMENTS
- SIGNATURES

Dickinson

User full name: John Dickinson
Managers: Mary Dickinson
Positions: Admin Asst HR Services
Organisations: Human Resource Services

- 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 towards these goals and meet with your supervisor to discuss prior to the next review.
- You and your supervisor will electronically sign the form when the review is completed.

Rating	Description
Does Not Meet Expectations	Performance does not meet expectations of the position. Corrective action has been identified and discussed with the employee. Reserve this rating for an employee who has not benefited from development and training, and continues to have difficulty with job responsibilities. Document specific critical incidents of behavior that illustrate this rating in the "comment" box.
Need Performance Development	Needs on-the-job or outside training to gain new skills and/or knowledge. Use this rating for an employee who is newly hired, recently promoted, has assumed new responsibilities, or requires/has requested performance development.
Meets Expectations	Performance consistently meets expectations of the position. Use this rating for a fully-trained employee who performs all expectations of the position.
Exceeds Expectations	Performance consistently exceeds expectations of the position. Reserve this rating for a highly-motivated employee who demonstrates superior quality work and maintains a high level of effectiveness with little or no supervision. Document specific critical incidents of behavior that illustrate this rating in the "comment" box.

[Next](#)

Read instructions
and click "Next"



Review of Performance

Dashboard Performance Team Reports and Learning

Dashboard / Team's Appraisals / 2016 Nonexempt Annual Review

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

Annual Review In progress Back to appraisal
Save progress

Complete by: March 31, 2017

- John Dickinson must complete this stage
- You must complete this stage
- John Dickinson's Manager's Manager must complete this stage

INTRODUCTION

REVIEW OF PERFORMANCE

REVIEW OF PERFORMANCE - CONTINUED

GOALS REVIEW

PERFORMANCE SUMMARY PER CATEGORY

OVERALL COMMENTS

SIGNATURES

There are required fields in this form marked *

Work Quality
The demonstrated ability to take personal responsibility for the accuracy and timeliness of accomplishing assigned tasks and duties. Demonstrates skills and knowledge relevant to one's own function or work group.

Work Quality - Category Rating
Visible to: Learner, Manager's Manager, Appraiser

Your answer *

Does Not Meet Expectations
 Needs Performance Development
 Meets Expectations
 Exceeds Expectations

Learner's answer
Meets Expectations

Work Quality - Comments
Visible to: Learner, Manager's Manager, Appraiser

Your answer

I feel my work meets established quality standards.

Learner's answer

Problem Solving
The demonstrated ability to identify issues and opportunities. Makes appropriate and timely decisions based on available facts, organizational policy, established guidelines, scope of position, and potential outcomes.

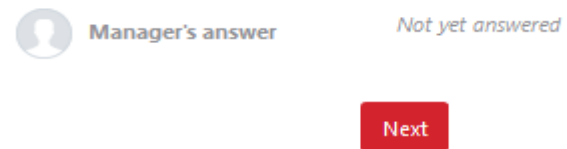
Go through each competency and indicate rating.

Employee's response

Employee's response

Provide comment/justification for your rating. Any rating listed as *Does Not Meet Expectations* or *Exceeds Expectations* must have rationale.

Review of Performance...continued



At the bottom of the page click "next" to move you through the appraisal.

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.

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

Employee's response

Provide your summary of goal

Overall Comments

Dashboard / Performance / Team / Reports / Find Learning

Dashboard / Team's Appraisals / 2016 Nonexempt Annual Review

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

Annual Review In progress

Complete by March 31, 2017

- John Dickinson must complete this stage
- You must complete this stage
- John Dickinson's Manager's Manager must complete this stage

Buttons: Back to appraisal, Save progress, Complete Stage

Navigation menu:

- INTRODUCTION
- REVIEW OF PERFORMANCE
- REVIEW OF PERFORMANCE - CONTINUED
- GOALS REVIEW
- PERFORMANCE SUMMARY PER CATEGORY
- OVERALL COMMENTS
- SIGNATURES

Overall Comments

Visible to: Learner, Manager's Manager, Appraiser

Your answer

Rich text editor content:

Overall John has had a successful year. His ability to accomplish his goal and his willingness to lend a helping hand where needed have been positive to the overall flow of the department.

It is vital that John continue to meet established deadlines with routine reports, this will be an area that will be monitored over the coming year.

Thank you for your contributions, I look forward to your continued success in the department.

Buttons: Learner's answer, Manager's Manager answer, Next

Complete the "Overall Comments" to reflect your summary of your performance and accomplishments for the review period.



Employee's response



Click "Next"



Signatures

Dashboard Performance Team Reports Find Learning

Dashboard / Team's Appraisals / 2016 Nonexempt Annual Review

You are viewing John Didkinson's appraisal.

Annual Review In progress

Completes by: March 31, 2017

John Didkinson must complete this stage
 You must complete this stage
 John Didkinson's Manager's Manager must complete this stage

[Back to appraisal](#)
[Save progress](#)
[Complete Stage](#)

INTRODUCTION

REVIEW OF PERFORMANCE

REVIEW OF PERFORMANCE - CONTINUED

GOALS REVIEW

PERFORMANCE SUMMARY PER CATEGORY

OVERALL COMMENTS

SIGNATURES

There are required fields in this form marked *

Signatures

User full name John Didkinson

Managers Mary Didkinson

Employee Full Name

Learner's answer John Didkinson

Employee Sign off date

Learner's answer 23 Jan 2017 at 13:35

Manager Full Name

Visible to: Manager's Manager, Appraiser

Your answer * Mary Didkinson

Manager Sign off date

Visible to: Learner, Manager's Manager, Appraiser

Your answer * 23 January 2017 15:10

Appraiser

Appraiser sign off date

By signing, employee acknowledges that all necessary forms have been reviewed with them and does not necessarily imply agreement with content.

[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 a learning management system. 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 / Team's Appraisals / 2016 Nonexempt Annual Review". A green notification box states "You have completed this stage". The main content area shows "You are viewing John Dickinson's appraisal." and "2016 Nonexempt Annual Review". It lists the job assignment as "test HR adm assist (Admin Asst HR Services)" and identifies participants: Learner: John Dickinson, Manager: Mary Dickinson, Manager's Manager: Benjamin Rush, and Appraiser: Role currently empty. A warning message indicates missing roles. A yellow progress bar shows the "Annual Review" stage is "In progress" with a "View" button. The progress bar includes a checklist: "John Dickinson must complete this stage" (checked), "You must complete this stage" (checked), and "John Dickinson's Manager's Manager must complete this stage" (unchecked). The completion date is "March 31, 2017". On the right side of the page, there are buttons for "Save PDF Snapshot" and "Print". A text overlay on the right says "You can print, save a PDF or View from this page." The bottom red navigation bar includes links for Home, Dashboard, Performance (with sub-links: Latest Appraisal, All Appraisals, Goals), Team, Reports, and Find Learning (Courses). The footer shows the user is logged in as Mary Dickinson with a "Log out" button and is powered by Totara LMS.

Dashboard / Team's Appraisals / 2016 Nonexempt Annual Review

You have completed this stage

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

2016 Nonexempt Annual Review

Job assignment linked to this appraisal:

- test HR adm assist (Admin Asst HR Services)

Participants:

- Learner: John Dickinson
- Manager: Mary Dickinson
- Manager's Manager: Benjamin Rush
- Appraiser: Role currently empty

Warning: there are missing roles which may prevent this appraisal being completed.

- Appraiser

Annual Review In progress View

Complete by
March 31, 2017

- John Dickinson must complete this stage
- You must complete this stage
- John Dickinson's Manager's Manager must complete this stage

Save PDF Snapshot Print

You can print, save a PDF or View from this page.

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

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

Powered by Totara LMS

Congratulations!
You have now completed your review.



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 beginning with the year for easy recognition in the coming months.

Creating a Goal for Next Review Period

Go to
"Performance"
and then
"Goals"

The screenshot shows a web application interface with a red header and footer. The header contains navigation links: Home, Dashboard, Performance, and Find Learning. 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 displays a '2016 Nonexempt Annual Review' page. The page includes a breadcrumb trail 'Dashboard / My Appraisals / 2016 Nonexempt Annual Review', a 'Save PDF Snapshot' and 'Print' button, and a list of job assignments and participants. A warning message states: 'Warning: there are missing roles which may prevent this appraisal being completed.' Below this, a yellow box indicates the review is 'In progress' with a 'View' button. The footer contains the user's name and role: '[Denette Moul] You are logged in as John Dickinson' and a 'Log out' button. The page is powered by Totara LMS.

Dashboard / My Appraisals / 2016 Nonexempt Annual Review

2016 Nonexempt Annual Review Save PDF Snapshot Print

Job assignment linked to this appraisal:

- test HR adm assist (Admin Asst HR Services)

Participants:

- Learner: John Dickinson
- Manager: Mary Dickinson
- Manager's Manager: Benjamin Rush
- Appraiser: Role currently empty

Warning: there are missing roles which may prevent this appraisal being completed.

- Appraiser

Annual Review In progress View

Complete by
March 31, 2017

- You must complete this stage
- Your Manager must complete this stage
- Your Manager's Manager must complete this stage

Home Dashboard Performance Find Learning

Latest Appraisal
All Appraisals
Goals Courses

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

Powered by Totara LMS

Creating Goals, Continued

Dashboard Performance Find Learning

Latest Appraisal All Appraisals Goals

Dashboard / Goals

NAVIGATION

Dashboard

- Home
- Site pages
- Courses

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 Computer Skills Goal		Goal In Progress	Self	

Export as CSV Export

Home Dashboard Performance Latest Appraisal All Appraisals Goals Find Learning Courses

[Denette Moul] You are logged in as John Dickinson [Log out](#)

Powered by Totara LMS

Click “Add personal goal”



Creating Goals, continued

Dashboard Performance Find Learning

Latest Appraisal All Appraisals Goals

Dashboard / Goals / Add personal goal

NAVIGATION

- Dashboard
- Home
- Site pages
- Courses

Create new personal goal

There are required fields in this form marked *

Name * 2017 Office 365 Goal

Description Would like to become proficient in utilizing Office 365 to assist in creating documents that can be viewed, shared, and updated by all members of the Human Resource Services.

Type
Unclassified
Business
Development
Wellness/Enrichment

Scale

Target date 23 January 2017 Enable

Save changes Cancel

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

Dashboard Performance Team Reports Find Learning

Latest Appraisal All Appraisals Goals

Dashboard / Goals / Add personal goal

Create new personal goal

There are required fields in this form marked *

Name * 2017 Human Resource Information System

Description • To become proficient in utilizing the Banner system for inputting appropriate employee information.

Type • Business

Scale • Goal scale

Target date • 30 December 2017

Enable

Save changes Cancel

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

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

Powered by Totara LMS

Select “Goal Scale”
from the drop-down
list.

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

Creating Goals, continued

Dashboard Performance Find Learning

Latest Appraisal All Appraisals Goals

Dashboard / Goals / Add personal goal

NAVIGATION

- Dashboard
 - Home
 - Site pages
 - Courses

Create new personal goal

There are required fields in this form marked *

Name * 2017 Office 365 Goal

Description ⓘ

Would like to become proficient in utilizing Office 365 to assist in creating documents that can be view, shared, and updated by all members of Human Resource Services.

Type ⓘ Business

Scale ⓘ Goal scale

Target date ⓘ 30 December 2017 Enable

Save changes Cancel

Home Dashboard Performance Latest Appraisal All Appraisals Goals Find Learning Courses

(Dennette Mou) You are logged in as John Dickinson [Log out](#)

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' dropdown menu set to 'CSV' and an 'Export' button. At the bottom, a red footer bar contains 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

Home Dashboard Performance
All Appraisals
Goals Team Reports Find Learning
Courses

Reports continued

The screenshot shows a web application interface with a red navigation bar at the top containing links for Dashboard, Performance, Team, Reports, and Find Learning. Below the navigation bar is a breadcrumb trail: Dashboard / Reports / Appraisal Detail. On the left side, there is a 'NAVIGATION' sidebar with a 'Dashboard' section containing links for Home, Site pages, and Courses. The main content area features a search box labeled 'Select an appraisal' and a section titled 'Appraisal Detail'. Below this title is a table with the following data:

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 Performance Team **Reports** Find Learning

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

- CSV
- Excel
- ODS
- PDF landscape
- PDF portrait

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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Carol Shaffer– 245-1503;
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