



Performance Appraisals in Totara

Self-Review Introduction for Nonexempt Employees

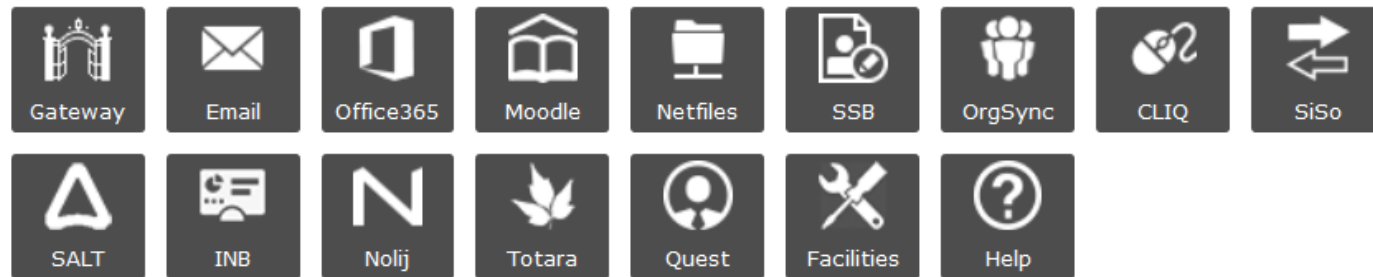
Sign into the Gateway



Gateway: Home

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

APPLICATION LAUNCH PAD



PASSWORD RECOVERY CONFIGURATION

CAMPUS BALANCES

Click on “Totara”

The screenshot shows the Dickinson Gateway: Home page. At the top is a red navigation bar with the Dickinson logo and links for REQUEST INFO, VISIT, APPLY, ALUMNI, and GIVE. Below this is a breadcrumb trail: GATEWAY: HOME / [Home icon]. To the right are social sharing icons: + SHARE, email, print, and a grid icon. The main content area is titled "Gateway: Home" in red. On the left is a dark sidebar menu with links: My Gateway, Employees, Campus Documents, Faculty Meetings, Alumni Directory, and FAS Directory. The main content area features an "APPLICATION LAUNCH PAD" section with two rows of application icons. A large red arrow points to the Totara icon in the second row. Below the icons are two red text labels: "PASSWORD RECOVERY CONFIGURATION" and "CAMPUS BALANCES".

Gateway: Home

APPLICATION LAUNCH PAD

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

Gateway, Email, Office365, **Totara**, Netfiles, SSB, OrgSync, CLIQ, SiSo

SALT, INB, Nolij, **Totara**, Quest, Facilities, Help

PASSWORD RECOVERY CONFIGURATION

CAMPUS BALANCES

Go to the "Performance" tab

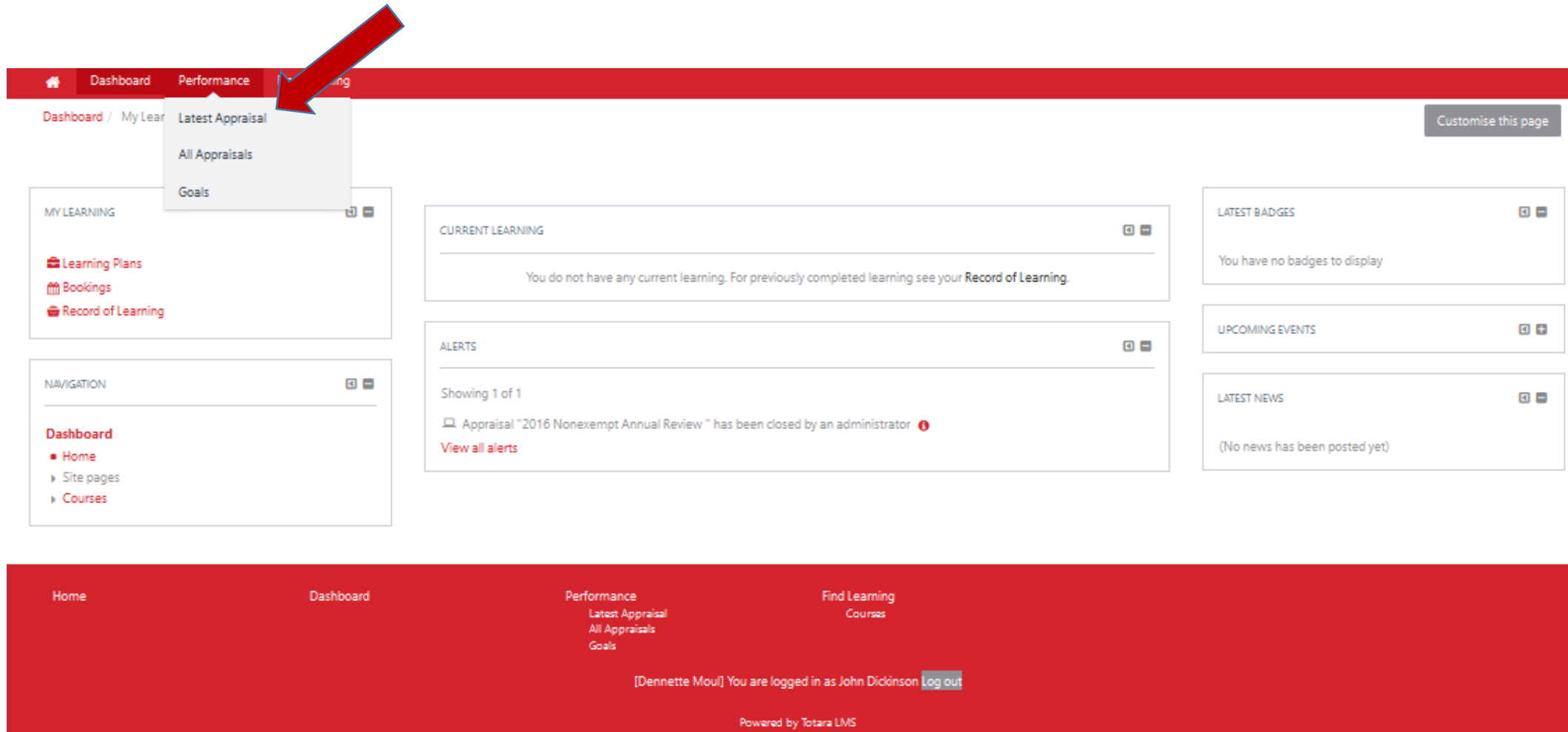


The screenshot shows a dashboard interface with a red navigation bar at the top. The 'Performance' tab is selected and highlighted. Below the navigation bar, the breadcrumb 'Dashboard / My Learning' is visible on the left, and a 'Customise this page' button is on the right. The main content area is divided 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 "Latest Appraisal"



The screenshot shows a user interface for a Learning Management System (LMS). At the top, there is a red navigation bar with the following items: Home, Dashboard, Performance, and Find Learning. A red arrow points to the 'Performance' menu, which has opened a dropdown menu containing three options: 'Latest Appraisal', 'All Appraisals', and 'Goals'. Below the navigation bar, 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". A link for "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 of the page, 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

Next, click “Start”

Dashboard Performance Find Learning

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

Complete by
March 31, 2017

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

Start

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

First page of the appraisal

The screenshot shows a web interface for an annual review. At the top, there is a navigation bar with 'Dashboard', 'Performance', and 'Find Learning'. Below this, a breadcrumb trail reads 'Dashboard > My Appraisals > 2016 Nonexempt Annual Review'. On the left, a 'NAVIGATION' sidebar contains links for 'Dashboard', 'Home', 'Site pages', and 'Courses'. The main content area is titled 'Annual Review' and indicates it is 'In progress'. It includes a 'Complete by' date of 'March 31, 2017' and three checkboxes: 'You must complete this stage', 'Your Manager must complete this stage', and 'Your Manager's Manager must complete this stage'. Action buttons for 'Back to appraisal', 'Save progress', and 'Continue review' are present. The reviewee's name, 'Dickinson', is displayed in large red text. Below this, a table lists personal and professional details: 'User full name: John Dickinson', 'Managers: Mary Dickinson', 'Positions: Admin Asst HR Services', and 'Organisations: Human Resource Services'. A list of instructions follows, detailing the review process and the importance of goal setting and documentation. At the bottom, a table provides a key for performance ratings: 'Does Not Meet Expectations', 'Need Performance Development', 'Meets Expectations', and 'Exceeds Expectations', each with a corresponding description. A red 'Next' button is located at the bottom center, with a large red arrow pointing to it from the right.

Dashboard Performance Find Learning

Dashboard > My Appraisals > 2016 Nonexempt Annual Review

NAVIGATION

- Dashboard
- Home
- Site pages
- Courses

Annual Review In progress

Complete by: March 31, 2017

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

Back to appraisal Save progress Continue review

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

The screenshot shows a web application for performance reviews. At the top, there is a red navigation bar with links for 'Dashboard', 'Performance', and 'Find Learning'. Below this, a breadcrumb trail reads 'Dashboard / My Appraisals / 2016 Nonexempt Annual Review'. On the left, a 'NAVIGATION' sidebar contains links for 'Dashboard', 'Home', 'Site pages', and 'Courses'. The main content area is titled 'Annual Review' and indicates it is 'In progress'. It lists completion requirements: 'You must complete this stage', 'Your Manager must complete this stage', and 'Your Manager's Manager must complete this stage'. Action buttons include 'Back to appraisal', 'Save progress', and 'Complete review'. A left-hand menu lists sections: 'INTRODUCTION', 'REVIEW OF PERFORMANCE', 'REVIEW OF PERFORMANCE - CONTINUED', 'GOALS REVIEW', 'OVERALL COMMENTS', and 'SIGNATURES'. The 'REVIEW OF PERFORMANCE' section is expanded to show 'Work Quality'. This section includes a description, a 'Work Quality - Category Rating' section with radio button options: 'Does Not Meet Expectations', 'Needs Performance Development', 'Meets Expectations' (selected), and 'Exceeds Expectations'. Below the rating is a 'Manager's answer' field showing 'Not yet answered'. A 'Work Quality - Comments' section follows, with a rich text editor containing the text 'I feel my work meets established quality standards.' and another 'Manager's answer' field showing 'Not yet answered'. The 'Problem Solving' section is partially visible at the bottom.

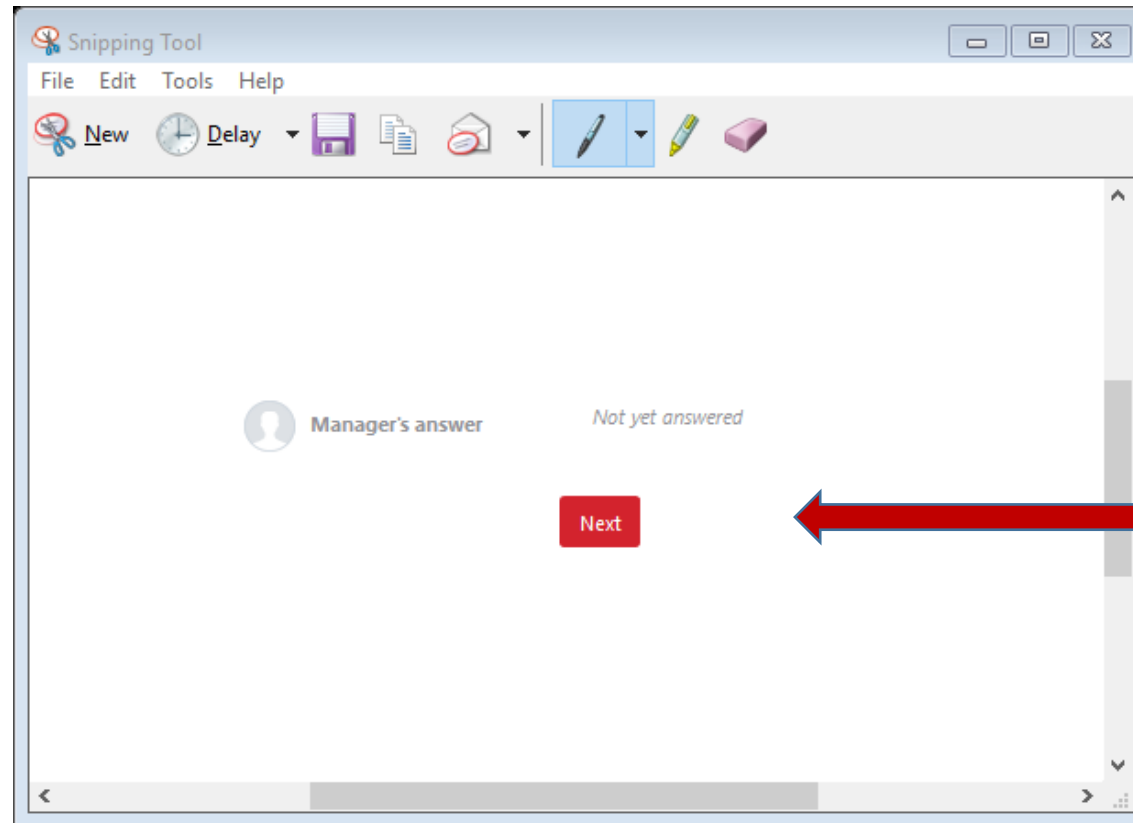
Go through each competency and indicate rating.



Provide comment/justification for your rating



Review of Performance...continued



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

Goal Review

NAVIGATION

Home

- Dashboard
- Site pages
- My courses

Annual Performance Appraisal

Complete by
April 2, 2018

In progress

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

Back to appraisal

Save progress

Complete Stage

INTRODUCTION

GOALS REVIEW

OVERALL
COMMENTS

SIGNATURES

Please Review Your Goals *

Choose goals to review

Next

Select the "Choose goals to review" and then click the goals you wish to have added to the appraisal.

Goal Review

Choose goals to review ✕

BROWSE SEARCH

Items to add

Personal Goals

Select All

2017 Goal Example



Use the drop-down list and select "Personal Goals" and then select all goals you wish to have in the 2017 appraisal from the list in red.

Save Cancel

Choose goals to review ✕

BROWSE SEARCH

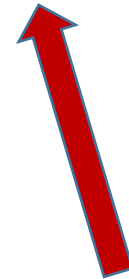
Items to add

Personal Goals

Select All

2017 Goal Example

2017 Goal Example



Goal(s) will be listed under "Items to add" and then select "save"



Save Cancel

Goals Review

The screenshot shows a web application interface for a 'Goals Review' process. At the top, there is a red navigation bar with links for 'Dashboard', 'Performance', and 'Find Learning'. Below this, a breadcrumb trail reads 'Dashboard / My Appraisals / 2016 Nonexempt Annual Review'. On the left, a 'NAVIGATION' sidebar lists 'Dashboard', 'Home', 'Site pages', and 'Courses'. The main content area features a yellow 'Annual Review' header with the status 'In progress' and three checkboxes: 'You must complete this stage', 'Your Manager must complete this stage', and 'Your Manager's Manager must complete this stage'. A 'Complete by' date of 'March 31, 2017' is shown. To the right of the header are buttons for 'Back to appraisal', 'Save progress', and 'Complete Stage'. Below the header, a list of review stages is shown: 'INTRODUCTION', 'REVIEW OF PERFORMANCE', 'REVIEW OF PERFORMANCE - CONTINUED', 'GOALS REVIEW', 'OVERALL COMMENTS', and 'SIGNATURES'. The 'GOALS REVIEW' stage is selected, showing a goal titled '2016 Computer Skills Goal' with a 'Current goal status' of 'Goal In Progress'. A 'Your answer' text box contains the message 'This is a required field', with a red arrow pointing to it from the right. Below the text box, a 'Manager's answer' section shows 'Not yet answered'. At the bottom of the main content area is a red 'Next' button, with a red arrow pointing to it from the right. The footer contains a navigation menu with 'Home', 'Dashboard', 'Performance' (with sub-links for 'Latest Appraisal', 'All Appraisals', and 'Goals'), and 'Find Learning' (with sub-link for 'Courses'). It also displays the user's name and role: '[Denette Moul] You are logged in as John Dickinson Log out', and the text 'Powered by Totara LMS'.

Insert your response to the goal you set up for the review 2016 review period.

When completed click "next"

Overall Comments

Dashboard / My Appraisals / 2016 Nonexempt Annual Review

NAVIGATION

- Dashboard
- Home
- Site pages
- Courses

Annual Review In progress

Complete by March 31, 2017

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

Back to appraisal
Save progress
Complete Stage

INTRODUCTION

REVIEW OF PERFORMANCE

REVIEW OF PERFORMANCE - CONTINUED

GOALS REVIEW

OVERALL COMMENTS

SIGNATURES

Overall Comments

Overall Comments

Visible to: Manager, Manager's Manager, Appraiser

Your answer

B *I* [List icons] [Link icon] [Image icon] [Table icon] [Quote icon]

This has been a very productive and successful year. I have spent time getting to work on a variety of projects that I feel have helped me become a better rounded HR Admin Assistant and more efficient when it comes to utilizing Microsoft Office products.

Manager's answer *Not yet answered*

Manager's Manager answer *Not yet answered*

Next

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

Click “Next”

Signatures

Dashboard Performance Find Learning

Dashboard / My Appraisals / 2016 Nonexempt Annual Review

NAVIGATION

- Dashboard
- Home
- Site pages
- Courses

Annual Review

In progress

Complete by: March 31, 2017

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

Back to appraisal

Save progress

Complete Stage

INTRODUCTION

REVIEW OF PERFORMANCE

REVIEW OF PERFORMANCE - CONTINUED

GOALS REVIEW

OVERALL COMMENTS

SIGNATURES

There are required fields in this form marked *

Signatures

User full name John Didkinson

Managers Mary Didkinson

Employee Full Name

Visible to: Manager, Manager's Manager, Appraiser

Your answer *

Employee Sign off date

Visible to: Manager, Manager's Manager, Appraiser

Your answer *

23 January 2017 13 35

Manager Sign off date

Manager's answer Not yet answered

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”

Dashboard Performance Find Learning

Dashboard / My Appraisals / 2016 Nonexempt Annual Review

You have completed this stage

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	<input checked="" type="checkbox"/> You must complete this stage <input type="checkbox"/> Your Manager must complete this stage <input type="checkbox"/> Your Manager's Manager must complete this stage	

Home Dashboard Performance Find Learning

Latest Appraisal
All Appraisals
Goals Courses

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

Powered by Totara LMS

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

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 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 top navigation bar. 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. Below the navigation bar, the page title is '2016 Nonexempt Annual Review'. The page content includes a job assignment, participants list, and a warning about missing roles. A yellow box highlights the 'Annual Review' status as 'In progress' with a 'View' button. The bottom navigation bar contains links for 'Home', 'Dashboard', 'Performance', and 'Find Learning'. The footer shows the user is logged in as John Dickinson and the system is powered by Totara LMS.

Dashboard Performance Find Learning

Dashboard / My Appraisal Latest Appraisal Review

All Appraisals

Goals

You have completed 1

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 [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

- 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
- 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"



For assistance contact:

Dennette Moul – 245-1026;
mould@Dickinson.edu

Carol Shaffer– 245-1503;
shaffeca@Dickinson.edu