Performance Appraisals in Totara

Self-Review Introduction for Exempt Employees
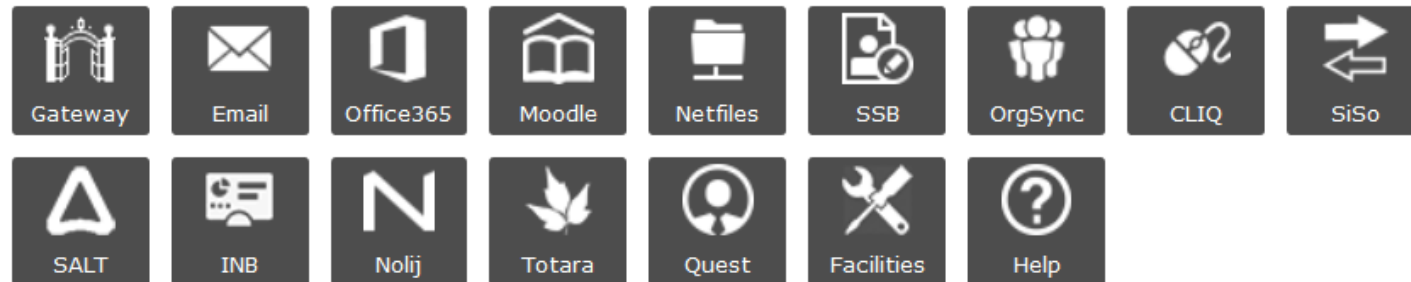
Sign into the Gateway

Click on "Totara"
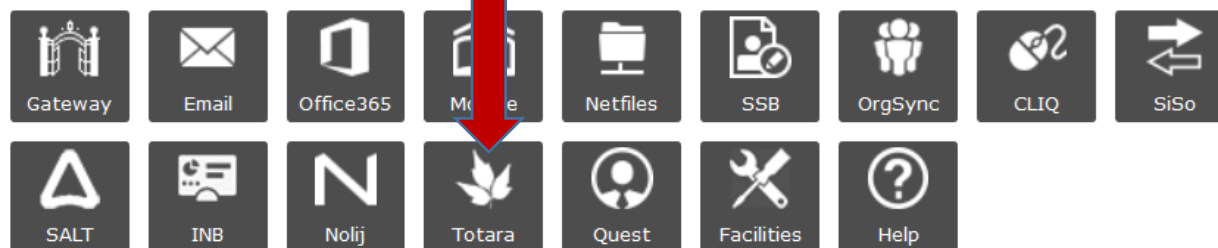
Go to the "Performance" tab

Go to the "Appraisal"

Next, click "Start"

First page of the appraisal

Goal Review

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

Personal Goals   Select All

Items to add

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
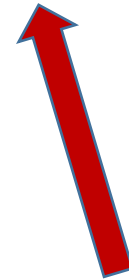
Choose goals to review

BROWSE   SEARCH

Personal Goals   Select All

Items to add

2017 Goal Example

2017 Goal Example

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

Save   Cancel

Goal Review

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

Provide your summary of goal

Click "Next"

Overall Comments

Dashboard   Performance   Team   Reports   Find Learning

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

Stage One

Complete by
March 31, 2017

In progress
☐ You must complete this stage
☐ Your Manager must complete this stage
☐ Your 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 *.

▼ Overall comments

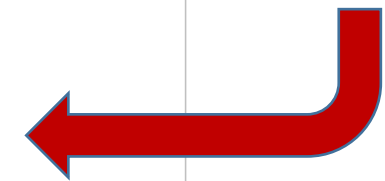Visible to: Manager, Manager's Manager, Appraiser

Your answer *

Required field for both employee
and appraiser.

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

Manager's answer   Not yet answered

Next   Click "Next"

Signatures

Ensure date is correct

Type in your full name

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 dropdown list.

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

Creating Goals, continued

Final step is to clic "Save Changes"

For assistance contact:

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

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