



# Performance Appraisals in Totara

Self-Review Introduction for Exempt Employees

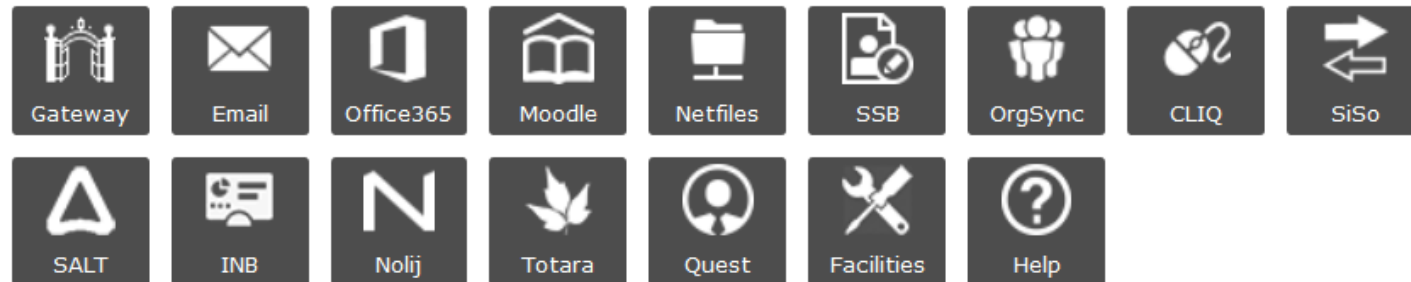
# Sign into the Gateway



## Gateway: Home

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

### APPLICATION LAUNCH PAD



### PASSWORD RECOVERY CONFIGURATION

### CAMPUS BALANCES

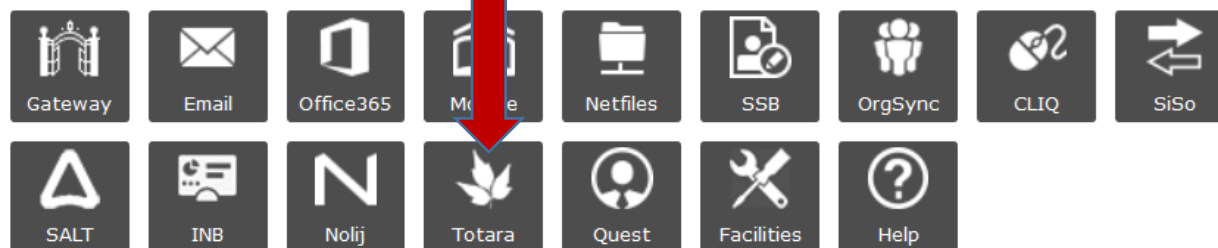
# Click on “Totara”



## 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



Dashboard / My Learning

Customise this page

MY LEARNING

- Learning Plans
- Bookings
- Record of Learning

NAVIGATION

- Dashboard
- Home
- Site pages
- Courses

CURRENT LEARNING

You do not have any current learning. For previously completed learning see your [Record of Learning](#).

ALERTS

Showing 1 of 1

Appraisal "2016 Nonexempt Annual Review" has been closed by an administrator

[View all alerts](#)

LATEST BADGES

You have no badges to display

UPCOMING EVENTS

LATEST NEWS

(No news has been posted yet)

Home Dashboard Performance Latest Appraisal All Appraisals Goals Find Learning Courses

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

Powered by Totara LMS

# Go to the “Appraisal”

**Dickinson**

Denette Moul  
You are logged in as John Dickinson

Dashboard Record of Learning **Performance** Find Learning Unused

Dashboard / My Appraisals / 2016 Nonexempt

Latest Appraisal  
All Appraisals  
Goals

2016 Nonexempt Annual Review TEST Appraisal

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: Role currently empty
- Appraiser: Role currently empty

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

- Appraiser

Annual Review In progress [View](#)

Complete by January 30, 2017

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

Home Dashboard Record of Learning Performance Find Learning Unused

Performance  
Latest Appraisal  
All Appraisals  
Goals

Find Learning  
Courses  
Programs  
Certifications

Unused  
My Bookings  
Learning Plans  
Calendar

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

Powered by Totara LMS

# Next, click “Start”

The screenshot shows a web browser window titled "Snipping Tool" displaying a performance management system. The interface includes a top navigation bar with links for 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 is titled "2016 Exempt (Administrative) Annual Review" and includes a "Save PDF Snapshot" and "Print" button. It lists the job assignment as "test Staff Supervisor (Supervisor)" and identifies participants: 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." and lists "Manager" as a missing role.

A yellow progress bar labeled "Stage One" is in an "In progress" state. It contains two checkboxes: "You must complete this stage" and "Your Appraiser must complete this stage". A grey "Start" button is located on the right side of this bar, and a red arrow points directly to it. The progress bar also indicates a completion date of "January 31, 2017".

The bottom of the page features a red footer with navigation links (Home, Dashboard, Performance, Team, Reports, Find Learning) and a user status bar: "[Dennette Mou] You are logged in as Mary Dickinson Log out". The footer also mentions "Powered by Totara LMS".

# First page of the appraisal

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

NAVIGATION

- Dashboard
- Home
- Site pages
- Courses

Stage One

In progress

Complete by  
January 31, 2017

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

Back to appraisal

Save progress

Complete Stage

INTRODUCTION

GOALS REVIEW

FINAL REVIEW AND SIGN OFF

## Dickinson

User full name	Mary Dickinson
Managers	
Positions	Supervisor
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 toward 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.

Next

Click Next

# 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

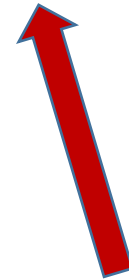
Items to add

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

# Goal Review

The screenshot shows a web application interface for 'Goal Review'. At the top is a red navigation bar with links for 'Dashboard', 'Performance', 'Team', 'Reports', and 'Find Learning'. Below this is a breadcrumb trail: 'Dashboard / My Appraisals / 2016 Exempt (Administrative) Annual Review'. On the left is a 'NAVIGATION' sidebar with 'Dashboard' selected, and sub-links for 'Home', 'Site pages', and 'Courses'. The main content area is titled 'Stage One' and 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 Appraiser must complete this stage'. There are three buttons: 'Back to appraisal', 'Save progress', and 'Complete Stage'. Below this is a section titled 'Please Review Your Goals' with a 'Collapse all' link. The main goal is '2016 Supervisory Goal'. The 'Current goal status' is a dropdown menu set to 'Goal Completed'. Below this is a 'Your answer' text area with the text 'Required field for both employee and appraiser'. At the bottom, there are sections for 'Manager's answer' and 'Appraiser's answer', both marked 'Not yet answered'. A red 'Next' button is at the bottom center.

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

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 \*

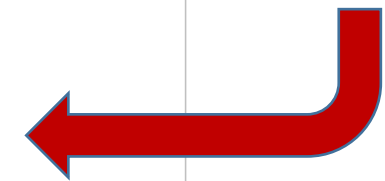
Required field for both employee and appraiser.

Manager's answer

Not yet answered

Next

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



Click "Next"



# Signatures

Dashboard Performance Learn Reports Find Learning

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

Stage One

In progress

Back to appraisal

Save progress

Complete Stage

Complete by: March 31, 2017

There are required fields in this form marked \*

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

Appraiser Sign off date

Appraiser's answer Not yet answered

Appraiser Full Name

Appraiser's answer Not yet answered

Employee Sign off date

Visible to: Manager, Manager's Manager, Appraiser

Your answer \* 23 January 2017

Employee Full name

Visible to: Manager, Manager's Manager, Appraiser

Your answer \*

Manager/Supervisor Sign off date

Manager's answer Not yet answered

Manager/Supervisor Full name

Manager's answer Not yet answered

User full name: Mary Olderson

Managers: Benjamin Rush

Positions: Supervisor

Organisations: Human Resource Services

Signatures

Complete Stage

Ensure date is correct



Type in your full name



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 shows the user's path: Dashboard / My Appraisals / 2016 Exempt (Administrative) Annual Review. The main content area features a 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)'. Another section, 'Participants:', lists 'Learner: Mary Dickinson', 'Manager: Benjamin Rush', 'Manager's Manager: Debra Hargrove', and 'Appraiser: Test Appraiser'. A prominent 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 a checklist: '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 links for 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', and the footer states '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 [View](#)

Complete by  
March 31, 2017

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

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.



**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 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 shows a '2016 Nonexempt Annual Review' section with a 'Save PDF Snapshot' and 'Print' button. Below this, there is a 'Participants' list and a 'Warning' message. A yellow box highlights the 'Annual Review' section, which is 'In progress' and includes a 'View' button. The footer contains the user's name and role, a 'Log out' link, and the text 'Powered by Totara LMS'.

Dashboard / My Appraisals / Review

Latest Appraisal  
All Appraisals  
Goals

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 Latest Appraisal All Appraisals Goals Find Learning Courses

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

Powered by Totara LMS



# Creating Goals, Continued

The screenshot shows a web application interface for managing goals. The top navigation bar is red and contains links for 'Dashboard', 'Performance', and 'Find Learning'. Below this, there are sub-navigation links for 'Latest Appraisal', 'All Appraisals', and 'Goals'. The main content area is divided into two sections: 'Goals' and 'Personal Goals'. The 'Goals' section has a table with columns for 'Name', 'Status', and 'Assigned via'. The 'Personal Goals' section has a table with columns for 'Name', 'Due', 'Status', 'Assigned via', and 'Edit'. A red arrow points to the 'Add personal goal' button in the 'Personal Goals' section. The footer is red and contains links for 'Home', 'Dashboard', 'Performance', and 'Find Learning'. It also displays the user's name 'John Dickinson' and a 'Log out' button.

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

The screenshot shows the 'Create new personal goal' form. The 'Name' field contains '2017 Office 365 Goal'. The 'Description' field contains the text: 'Would like to become proficient in using Office 365 to assist in creating documents that can be viewed, shared, and updated by all members of Human Resource Services.' The 'Type' dropdown menu is open, showing options: 'Unclassified', 'Business', 'Development', and 'Wellness/Enrichment'. The 'Target date' is set to '23 January 2017'. There are 'Save changes' and 'Cancel' buttons at the bottom.

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 dropdown 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 \*

Description

Type

Scale

Target date     Enable

Home Dashboard Performance Latest Appraisal All Appraisals Goals Find Learning Courses

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

Powered by Totara LMS

Final step is to clic  
"Save Changes"



For assistance contact:

Dennette Moul – 245-1026;  
[mould@Dickinson.edu](mailto:mould@Dickinson.edu)

Carol Shaffer– 245-1503;  
[shaffeca@Dickinson.edu](mailto:shaffeca@Dickinson.edu)