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# 1 Manual Annual Performance Appraisal Form UT

This is a technical manual for the web application Annual Performance Appraisal UT.

In this manual, the screens and buttons are explained. An explanation of the various elements can also be found in the application by clicking on the button [MORE INFORMATION] on the home page and in the menu.

## 1.1 General

The annual performance appraisal consists of 3 phases that are successively completed in the application.

1. Planning
2. Progress
3. Evaluation

Every phase contains three blocks:

- **Personal data:** these data are imported directly from the personnel information system.
- **Result agreements:** In this block the staff member and supervisor record the desired objectives for the coming period. This means that objectives and (core) values of the UT are applied to your position, ambition and personal goals.
- **Behaviour:** In this block, agreements are recorded regarding competencies, attitude and behaviour that are required for your position.
- **Career development:** In this block, wishes regarding tasks, training or career development are recorded.
- **Other:** In this block, topics can be recorded that have not come up in the other blocks.
- **Completion:** In the completion block, the recorded agreements are signed for approval by the staff member and supervisor.

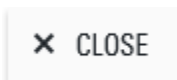
## 1.2 The web application Annual Performance Appraisal

Open the application Annual Performance Appraisal by clicking on the following URL.

<https://webapps.utwente.nl/fjut2/>

### PLEASE NOTE:

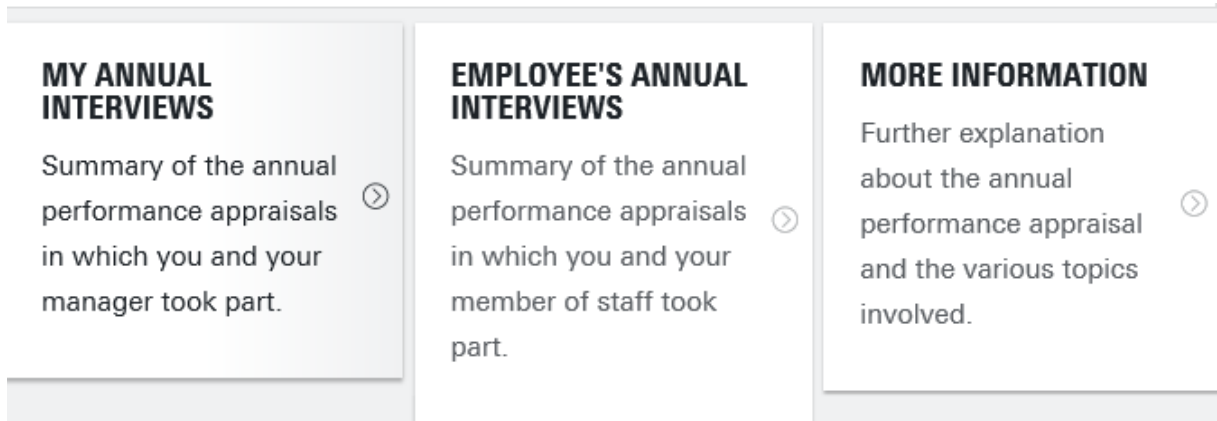
*Always exit the annual performance appraisal by clicking on the button "CLOSE" at the bottom of the screen, so that the appraisal can immediately be made available to others. The annual performance appraisal will be automatically exited after 4 hours of inactivity.*



## 2 INTRODUCTION

First, the introduction page will appear. You will see the following buttons:

- **[MY ANNUAL PERFORMANCE APPRAISALS]**, overview of all annual performance appraisals conducted via this application.
- **[MY STAFF MEMBERS]**, this feature is only available to the supervisor.
- **[MORE INFORMATION]**, this is where you will find the link to additional information on the Human Resources website.



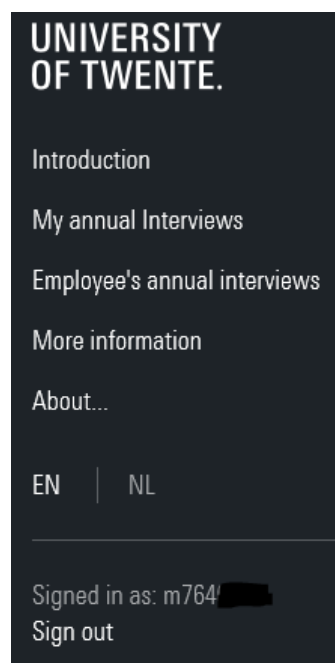
## MENU

The menu bar is on the left of the screen.

If you are using a tablet or smartphone, you will see a customized screen and the menu bar will not be visible. In that case, the menu bar can be made visible by clicking on the three stripes in the top left corner.



Use this menu bar to click through to other screens. Close the menu by clicking on the x in the menu bar.



## 2.1 MY ANNUAL PERFORMANCE APPRAISALS

In the screen MY ANNUAL PERFORMANCE APPRAISALS, you can create a new annual performance appraisal. The screen also offers an overview of past and current annual performance appraisals.

### 2.1.1 Adding an Annual Performance Appraisal:

You add a new annual performance appraisal:

- when you are using the application for the first time;
- after the evaluation phase of your current annual performance appraisal, to record agreements for the coming period.

Appointment: select your appointment by clicking on the icon next to [NEW ANNUAL INTERVIEW].

Then click on the button [NEW ANNUAL INTERVIEW] to create a new annual performance appraisal.

NEW ANNUAL INTERVIEW

A new annual performance appraisal has been created.

### 2.1.2 Overview Annual Performance Appraisal:

If you have already completed some annual performance appraisals or are still working on them, you will see an overview of annual performance appraisals here.

NEW ANNUAL INTERVIEW

Period	Department (Delegated) Manager	Phase Status
--------	-----------------------------------	-----------------

- **Period:** start and end date of the annual performance appraisal.
- **Department:** the department where you work.
- **(Delegated) Supervisor:** the supervisor with whom you conduct the annual performance appraisal.
- **Phase:** Planning, Progress or Evaluation
- **Status:** the status of the annual performance appraisal: whose turn is it?

Buttons:

- **Edit:** the Annual Performance Appraisal form is opened.
- **Download:** a PDF of the annual performance appraisal is generated. A PDF can be generated in each phase of the annual performance appraisal.

EDIT

DOWNLOAD

## 2.2 MY STAFF MEMBERS

If you are a supervisor, you will have access to the annual performance appraisals of all staff members with whom you are conducting annual performance appraisals as a supervisor or delegated supervisor. As supervisor, you can also create a new annual performance appraisal for a staff member.

### Search for staff member

Name: select the appropriate staff member by clicking on the icon or by entering the name of the staff member.

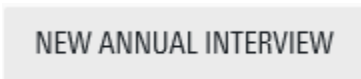
FILTER:	-- Select employee --	NEW ANNUAL INTERVIEW	-- Select job position --
---------	-----------------------	----------------------	---------------------------

You will then see a list of annual performance appraisals for this staff member.

Period	Employee (Delegated) Manager	Phase Status		
--------	---------------------------------	-----------------	--	--

- **Period:** start and end date of the annual performance appraisal
- **Staff member:** Annual performance appraisal staff member
- **(Delegated) Supervisor:** the supervisor with whom you conduct the annual performance appraisal.
- **Phase:** Planning, Progress or Evaluation
- **Status:** the status of the annual performance appraisal: whose turn is it?

As supervisor, you can also create a new annual performance appraisal for a staff member by clicking on the button [NEW ANNUAL PERFORMANCE APPRAISAL].



## 2.3 MORE INFORMATION

The button [MORE INFORMATION] will take you directly to the Human Resources website, which contains substantive information about the annual performance appraisal.

- Brochure Annual Performance Appraisal, including check-list
- Manual web application FJUT
- Manual educational performance / annual performance appraisal.

## 3 The Annual Performance Appraisal:

### 3.1 PLANNING

Every new annual performance appraisal begins with the PLANNING phase.

## Planning

### 3.1.1 PERSONAL DATA

The personal data are imported from the personnel information system via a direct link. Changes made by the supervisor etc. are immediately visible.

In this block, you can:

- click through to the University Job Profile web application by clicking on your University Job profile;
- change the start and end date (default is 1 year);
- fill in the planning date for the annual performance appraisal.

UNIVERSITY JOB PROFILE	<a href="#">03.06.20.Medewerker administratieve processen en systemen 2</a>		
STARTDATE PERIOD	19-10-2017 	ENDDATE PERIOD	19-10-2018 
SCHEDULED DATE OF ANNUAL PERFORMANCE APPRAISAL	19-10-2017 		

Click on the button [COMMIT] to save the changes.



### 3.1.2 RESULT AGREEMENTS

When you click on [TIPS], a menu will appear with additional tips about result agreements.

Click on the button [APPEND APPOINTMENT] to add a new agreement.

Tips 

+ APPEND APPOINTMENT

In the next screen, you record the title of the result agreement as well as a description of the agreement.

The result agreement can be entered by either the supervisor or the staff member.

Click on [MORE INFORMATION] in the menu bar for substantive information about recording a result agreement.

The following buttons are available:

[COMMIT] - record the result agreement as entered

[CANCEL] - the entered result agreement is not recorded

[+ APPEND APPOINTMENT] - this button allows you to add a new agreement.

AGREEMENT ON CONDUCT

DESCRIPTION OF THE AGREEMENT

✓ COMMIT

⊘ CANCEL

+ APPEND APPOINTMENT

### 3.1.3 BEHAVIOUR

Make agreements about the competencies, attitude and behaviour that are required for your position. Determine how these can be developed, if necessary. Refer to the competencies in your University Job Classification profile when making agreements.

[Tips](#) ▾

AGREEMENT ON CONDUCT

DESCRIPTION OF THE AGREEMENT

✓ COMMIT

⊘ CANCEL

### 3.1.4 CAREER DEVELOPMENT

Make agreements about your professional development. This can pertain to further development in your current job, or to a next career step within or outside the UT.

AGREEMENTS CONCERNING  
CAREER DEVELOPMENT



### 3.1.5 OTHER

In this block, agreements can be recorded about topics that have not come up in the other blocks, but are important for your well-being, functioning and cooperation with colleagues in the coming year.

#### **OTHER**

You can use this section to reach agreements on elements that have not been raised previously, but which will be important for your well-being, performance, and ability to cooperate during the upcoming year.

### 3.1.6 COMPLETION

In the block Completion, agreements can be recorded by clicking on the checkmark.

When both the staff member and the supervisor have approved the agreements, the PLANNING phase is exited and the PROGRESS phase will be opened.

***PLEASE NOTE:*** if one person has checked an agreement for approval and the other person alters something in the Planning phase, both checkmarks are removed. The first person must then check the agreement for approval anew in order to proceed to the Progress phase.

**[APPROVED STAFF MEMBER]:** this feature is only available to the supervisor.

**[APPROVED SUPERVISOR]:** this feature is only available to the supervisor.

**[EXIT FORM]:** when you click here, all entered data are saved and the form is closed.



## CONCLUSION SCHEDULING ANNUAL INTERVIEW OCT/2017-OCT/2018

By signing the form, the manager and the member of staff are also signing off on the report, confirming that it is a correct representation of the points discussed.

SEEN EMPLOYEE  Date seen by 19-10-2017

SEEN MANAGER  Date seen by 19-10-2017

### 3.2 PROGRESS



The next phase is Progress. During the year, one or more progress reviews may be conducted by the supervisor and staff member. The staff member can also keep track of the progress him/herself. In the Progress phase, agreements that were recorded in the Planning phase cannot be altered. Changes can be entered in the block Progress, so you always have a complete overview.

PROGRESS

New agreements can be added in this phase as well. They must be approved by both the supervisor and the staff member.

Agreements that have not been approved will not be taken to the next phase, Evaluation.

New agreements only proceed to the evaluation phase if manager and employee have seen them.

The blocks CAREER DEVELOPMENT and OTHER can no longer be complemented. In PROGRESS you can directly proceed to EVALUATION by clicking on the button [TO EVALUATION PHASE]]. The Progress phase can be skipped.



### 3.3 EVALUTATION



The annual performance appraisal ends with an Evaluation. As soon as the evaluation date is known, it must be recorded in the form.

In the Evaluation phase, the following blocks are available:

#### 3.3.1 Evaluation

The Evaluation screen displays the same agreement information as the Progress screen.

It is no longer possible to alter agreements that have been recorded in the blocks Agreements and Progress.

In the Evaluation phase, the fields Evaluation and Result can be completed for each result agreement.

**Evaluation:**

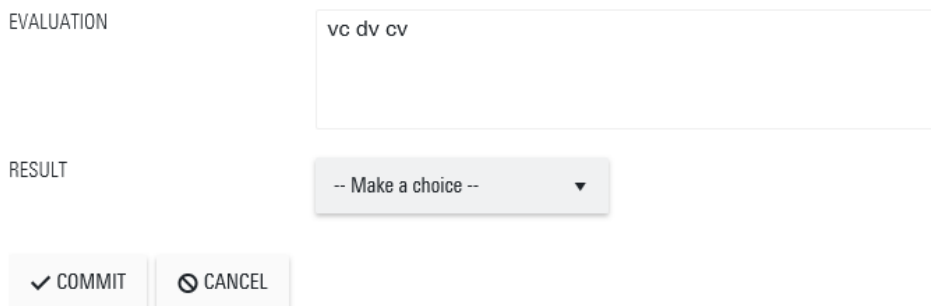
Here, both the supervisor and the staff member can record an evaluation of the agreement.

**Result:**

The Result field is only accessible to the supervisor.

A drop-down menu offers the following options:

- Well above expectation
- Above expectation
- Meets expectations
- Below expectation
- Well below expectation



### 3.3.2 Attachments:

In the block Attachments, attachments can be uploaded, such as:

- Educational performance
- Publication List
- 360-degree Feedback

Click on the button [SELECT FILES] and find the file to upload:

SELECT THE FILE CONTAINING THE SUPPLEMENT/ATTACHMENT.

SELECT FILES...

### 3.3.3 FINAL EVALUATION

The final evaluation is reserved for the supervisor, based on the result of the agreements made. This is where the supervisor provides an overall impression of the annual performance appraisal. Next to the field [FINAL EVALUATION ACCORDING TO SUPERVISOR], you will find the same help list that is available when you click on [RESULT] in the blocks Result Agreements and Behaviour.

#### Explanation:

In the Explanation field, the supervisor offers an added explanation of the annual performance appraisal.

#### Response by member of staff:

In this field, the staff member can enter a response to the annual performance appraisal and the explanation by the supervisor.

## FINAL EVALUATION

The final evaluation is decided by the manager and is based on the agreements reached.

FINAL EVALUATION ACCORDING TO  
MANAGER

Well above expectations ▼

EXPLANATORY NOTES

RESPONSE BY MEMBER OF STAFF

ewdwedwe

### 3.3.4 Conclusion

In the block Conclusion, the annual performance appraisal is completed when both the supervisor and the staff member have submitted their approval. When both have approved the annual performance appraisal, it can be closed.

From then on, the annual performance appraisal will only be available in PDF format.

## CONCLUSION EVALUATION ANNUAL INTERVIEW OCT/2017-DEC/2018

By signing the form, the manager and the member of staff are also signing off on the report, confirming that it is a correct representation of the points discussed.

SEEN EMPLOYEE  Date seen by 23-10-2017

SEEN MANAGER  Date seen by 23-10-2017

COMMIT  CLOSE EVALUATION PHASE

CLOSE  DOWNLOAD