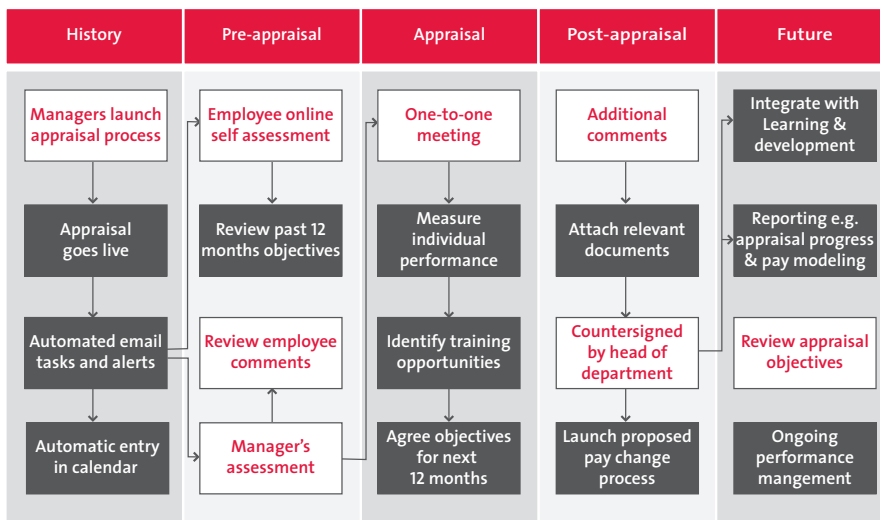


Appraisals

Well-run appraisal schemes benefit the individual, the line manager and the organisation. Yet too much paperwork, excessive bureaucracy and lengthy sign-off procedures can easily stifle the process and limit its effectiveness. The Appraisals module within SelectHR simplifies the entire lifecycle. Providing an electronic, step-by-step workflow, this simple, web-based tool not only significantly reduces paperwork and re-keying, but provides all the elements you need to ensure appraisals take place, consistently, across your whole organisation.



One central system: you can manage, streamline and record all your appraisal information. Keep your processes watertight using our intuitive workflow system – a system that automates where possible and prompts any further action needed to save you precious time. (In this workflow, white indicates people processes, and grey system processes.)

Helping you prepare

Under constant pressure to deliver to a daily workload, neither managers nor staff may find adequate time to prepare for appraisals. This can lead to lengthy, unstructured meetings that prove unsatisfactory for both parties. SelectHR helps you overcome this challenge by allowing you to issue self-appraisal forms well in advance.

By giving employees adequate time to prepare, the meeting is far more likely to be spent recapping and moving forward on salient points than going over old ground – more productive for all involved.

Setting timescales

Keeping track of when appraisals are due to happen (and making sure that employees complete their part on time) can also be a headache.

Using SelectHR, you can set timescales in the software to kick-start key stages of the appraisal process. For example, you'll be notified via email of the next appraisal date, and when an employee's objectives are due for review.

Let's say you, as a line manager, decide to issue the appraisal two weeks before the interview. This gives you a week to review its content, make any changes, and a further week for employees to return the information to you. Using SelectHR, you can set these timescales using alerts. On logging into SelectHR, the employee record will tell you everything you need to know. From here, you can review that person's history for the period of time they have been with the company, and quickly update any areas within the appraisal before issuing the form to the employee.

Key benefits

Greater consistency within the appraisal process

Significant reduction in paper-based admin

Allows appropriate time for employees to prepare

Increased protection of employee information

Easy to use workflow speeds up data entry

Eliminates rekeying between different areas of HR

Accurate, real-time reporting information

Convenient online access for staff and managers

Web-based access

Like the rest of SelectHR, the Appraisals module is web-based. This has several advantages for both manager and employee. Time-pressed managers, who may find it more convenient to work on appraisals outside office hours, now have the option to do so.

For staff, appraisals are available on a self-serve basis, allowing off-site workers to fill in the required information from any location. By providing greater accessibility to the appraisal document, you can significantly speed up the workflow and make it more efficient.

Booking employees' time

Before issuing the appraisal document, you will want to set a time, date and location for the appraisal. SelectHR is integrated with Microsoft Outlook calendar software, so the appraisal meeting will appear in the employee's calendar as an appointment.

Updating the employee

Once you've submitted the appraisal, an email will tell the employee their appraisal form is ready to review. A task will also appear on the individual's homepage within SelectHR. Using the combination of alerts and tasks will reassure employees that their appraisal is important and being taken seriously.

Filling out the form

Once logged into SelectHR, the employee can open up the appraisal form and start completing it. Each area within the appraisal form can be grouped under separate headings and linked in a workflow, making it logical to follow and ensuring no steps are missed out. You control and select the sections you want. For example:

- personal details
- review of previous objectives
- competencies
- setting objectives
- training needs
- career progression
- general notes and comments.

Once you've completed one section, you can save it before starting the next. Saved sections can be returned to at any time, allowing the appraisal to be completed in manageable sections and making the process far less daunting for employees, especially those who may never have completed an appraisal document before.

Reviewing employee input

Once the employee has finished working through the appraisal workflow, they simply need to click 'submit' to indicate to the manager that their part is complete. On receiving this alert, you can log back into SelectHR and review what has been written. Managers have the option to add additional notes at this point, and can also choose to fill in the objectives/competencies rating chart if you've included one. Of course, there will be some areas that you can – and should – only fill out during the course of the appraisal itself.

Setting objectives

Having reviewed the employee's progress against the previous year's objectives, you'll want to set some new ones. SelectHR makes this very simple. Our consultants can pre-configure the data to be captured (see below) so all the manager needs to do is click 'new' and enter the required information. For example:

- Method: how will the objective will be achieved (e.g. through a training course, progress against KPIs)?
- Date: when is the objective to achieved by?
- Weighting: do you wish to stress the importance of one objective over another (e.g. is it essential or desirable)?

Once you've entered the employee's objectives (you can add as many as you like), simply click 'complete' to finish that step.

Competencies

Creating competencies, and measuring your employees against them, is a key part of the appraisal process. Using SelectHR, it's easy to create your own competency list and corresponding scoring system;

you can include behavioural and technical competencies and define proof or 'evidence factors' if you wish.

Counter signatories

In any appraisal process, both employee and line manager should sign the form to confirm that it contains an accurate record of all the issues discussed. Within SelectHR, this takes the form of a simple tick box – dispensing with the time-consuming process of printing and signing multiple copies.

Once this box has been ticked, the counter signatory can then view specific areas within the system and add notes at any time. This makes it very easy for you to keep accurate, timely records on any of the objectives set and for employees to follow up on the appraisal without delay.

If your appraisal process requires counter signing by more than one person, then your own rules can be built into the workflow, enabling this to be triggered automatically at the relevant point in the process.

Clear, simple formats

It's all too easy to fall victim to a badly designed appraisal form. Word documents filled with charts, tables and text boxes that lead to lengthy and complex documents which distract from the task at hand.

Appraisals within SelectHR are designed with the end user in mind. Our consultants can recreate any number of questions, using flexible design tools such as drop-downs, radio buttons and tick boxes to ensure that the appraisal flows well and is easy to fill out. We can also ensure that mandatory information is collected (for example by ensuring the employee fills out one section before they can move to the next). All of this ensures that data collection is consistent and accurate, whoever uses the system.

Data protection

It goes without saying that information discussed in appraisals should remain confidential. Yet reliance on traditional methods for data collection and storage can put this security at risk.

Hard copies can easily go missing, or be mistakenly viewed in unlocked filing cabinets, leaving information of a highly sensitive nature left exposed for others to view.

By moving from a paper-based system to a centralised, electronic one, you instantly protect your employees' confidential information. Appraisal forms are security controlled; ensuring data can only be entered and reviewed by people with your specified access permissions.

Associated documents (e.g. training information, certificates) can be attached in soft copy to the employees' record; notes can be taken during the appraisal itself and updated straight into the system. Even the counter signatory can be carried out electronically – nothing ever has to be printed out. Of course, this doesn't just protect your information – it also saves paper and the associated storage costs.

Integration with Learning & Development

Like the rest of the SelectHR system, the Appraisals module is fully linked to other relevant areas within the database. This makes it very easy to look up associated information and update the system without having to re-key any data.

For example, having identified the employee's training needs within the appraisal meeting, these will be fed through to the Learning & Development part of the system, automatically placing the employees on the waiting lists for the appropriate courses.

Dashboard reporting

Information held within the module can also be utilised within your reports. For example, you could see a breakdown of all those employees who had completed their appraisals, and those who have yet to complete theirs. By using one of the many Dashboard reports in SelectHR, you can see this information graphically (e.g. as a pie chart), providing a real-time view of information that will help you manage your team more efficiently.

If your appraisal is based around competencies or includes ratings, you can also choose to view this through a report or dashboard giving you an insight into performance levels across your organisation.

Record keeping

Using SelectHR, everything from training updates to persistent absence

– not forgetting occasions when the employee has performed well – can be quickly noted down. This is particularly important when you are under pressure to provide factual examples of performance to raise with the employee at the formal review. Without this, the appraisal itself runs the danger of becoming a haphazard chat based on anecdotes alone.

Using SelectHR, updating appraisal documents becomes a simple case of record keeping, rather than a large administrative task to be dreaded.

Who we are

Access UK is a specialist software developer and consultancy business. Developed here in the UK and supported locally, our aim is to cut through complexity and increase efficiency for your business.

Multi-award-winning, Access offers solutions for accounting and finance, manufacturing and distribution, professional services automation, HR, payroll, service management and CRM.

Further information

For further information on the Access software portfolio, please telephone us on **01206 322575**, email **info@theaccessgroup.com** or visit **www.access-select.co.uk**