



St Mary's
University
Twickenham
London

Staff Appraisal Guidance

- **Appraisals and recording on PeopleNet**

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PURPOSE OF APPRAISAL

St Mary's is committed to retaining, nurturing and developing talented individuals no matter what their seniority and position within the University. The Appraisal Process provides the framework to do this.

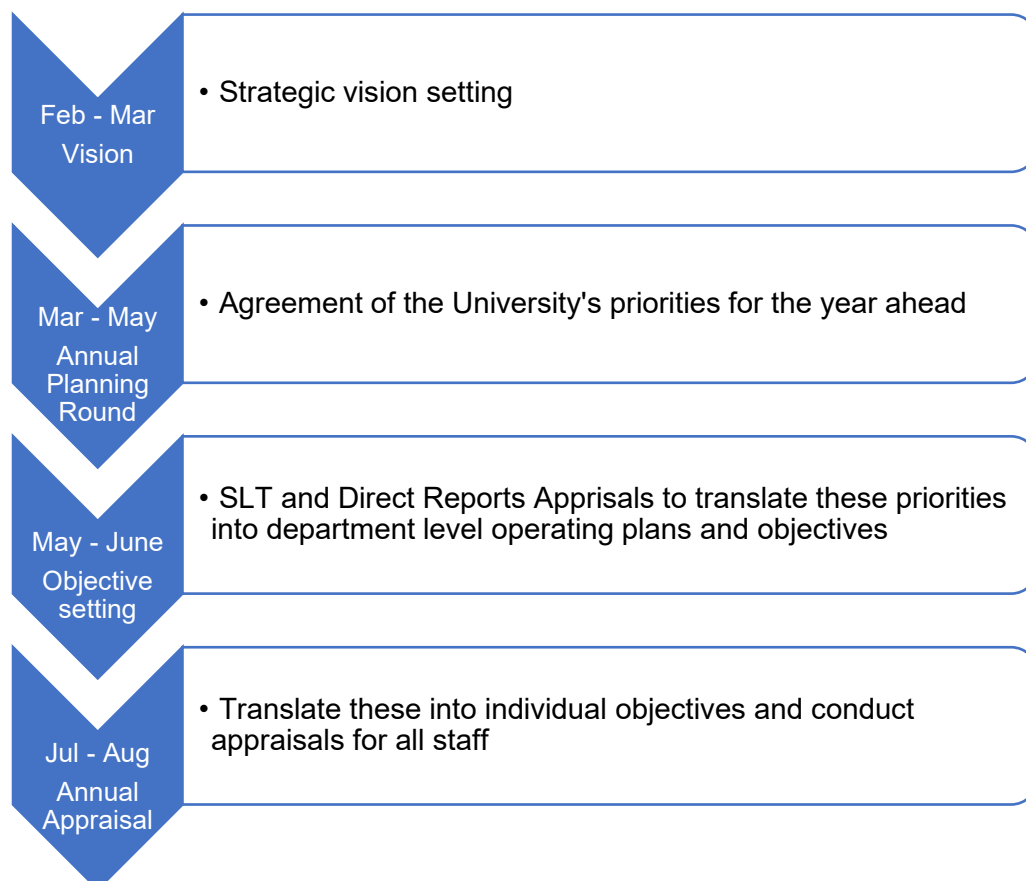
It is an opportunity to reflect on the personal contribution made by individuals during the last review period and to look forward to the coming year. The process should cover the value individuals bring to their current position and discussion about position(s) that would best suit their skills into the future.

In addition, it should include the identification of development individuals require that will enable them to flourish.

PROCESS

It is important that individuals understand how their contribution adds to the overall success of St Mary's. This leads to motivated and engaged staff who are committed to their own development and progression.

The diagram below sets out the stages and timeframes for University wide, departmental and individual level objective setting and the cascade of these into appraisal.



PREPARATION FOR THE APPRAISAL

The following points should be considered when completing your online appraisal form in preparation for an appraisal meeting:

STAGE 1 – Actions for Appraisee

Step 1 – Complete Looking Back section

- Copy and paste your objectives from last year into your form for this year. Any objectives should be SMART objectives.
- How well were the objectives met – what worked well, what are the learning points, what could be done differently in the future?
- If objectives were not met, what were the reasons for this and what can be done to ensure that future objectives are realistic?

You have the opportunity to write any additional comments in the free-text box on the form, reflecting on your performance and how your behaviour aligns with the university values. You will also be required to rate how you think you have performed overall using the ratings below.

Ratings Definitions

5	Consistently exceeded expectations - has achieved a level of excellence in delivering the requirements of the role; work is of excellent quality and consistently exceeds planned outcomes/goals. Overall, has made an exceptional or unique contribution to the University's School/Service's key objectives.
4	Frequently exceeded expectations – has exceeded expectations in performing key aspects of the role; work is of a high quality and frequently exceeds planned outcomes/goals. Overall, has made a significant contribution to the University's and School/Service's key objectives.
3	Achieved expectations – has fulfilled expectations in performing key aspects of the role; work is of a good quality and the main planned outcomes/goals have been met. Overall, has made a positive contribution to the University's and School/Service's key objectives.
2*	Partially achieved expectations – has not met expectations in key aspects of the role; the quality of work and/or output is not consistently to the required standard and a number of planned outcomes/goals have not been met. Overall, is not yet making a full contribution to the University's and School/Service's key objectives.
1*	Failed to achieve expectations – overall, has not met the role requirements; the quality of work and/or output is not of the required standard and the planned outcomes/goals are unmet. Overall, contribution to the University's and School/Service's key objectives is unsatisfactory.

** Where the Appraisee has been rated at 1 or 2, a performance improvement plan will be put in place to support them. Importantly, the appraisal meeting must not be the first time the Appraisee hears that his or her contribution has not met the required standard.*

University Behaviours and Values

Our four core values define St Mary's and underpin all we do as a University. As an organisation which prides itself on its values, striving to embody St Mary's Values in our day to day work is a core expectation for every member of staff. Embodying our values is just as important as meeting other annual objectives, and our appraisal process recognises this explicitly, by asking staff and managers to consider how their behaviours and attitudes have demonstrated a commitment to St Mary's Values over the past year.

The reasons for doing this include:

- Keeping St Mary's values at the forefront of all we do
- Recognising staff for their contribution to making St Mary's values a lived reality and therefore creating our desired culture
- Addressing performance issues relating to a staff members behaviours and attitude if actions fall short of St Mary's values through a transparent and fair process

Our core values are:

- Inclusiveness
- Generosity of Spirit
- Respect
- Excellence

These values have corresponding behaviours which are examples of how they can be embodied. The [Values and Behaviours guide](#) provides definitions of the values and the corresponding behaviours.

On the online Appraisal Form, there is space for Appraisees to add comments and reflections in the looking back page.

Looking Forward Objectives

You and your line manager will discuss and agree objectives for the next review period during your appraisal meeting. If you have suggested objectives for discussion during the meeting you can add them here for your line manager to review ahead of the meeting.

Complete Development & Growth and Career Development sections

The Development & Growth section should be used to record any future training needs to support performance and development in the current role. It may also be used to capture discussions on career development plans and aspirations. These can be added to or updated following your appraisal meeting with your line manager.

Development activities are not restricted to training courses and may include opportunity to participate in projects, exposure to new areas/experience, coaching, mentoring, activity related to professional associations, line management support or any other appropriate activity with a view to enhancing the skills, knowledge and behaviour required to support individual development and future performance.

You can find information about the [development opportunities available at St Mary's here](#).

Academic Staff: The areas of Teaching, Research, Enterprise, Professional practice and Administration may be useful to reflect upon/inform discussion on future professional development.

Essential Training

All staff at St Mary's University are expected to remain up to date on essential training, as identified in the university's Essential Skills Matrix. The Essential Skills Matrix sets out required training all staff must complete to ensure they are compliant with relevant regulation and legislation. You can find a list of the training required for your role in the [Essential Training Matrix](#).

The Appraisal Form will ask you to record whether you have completed the essential e-learning training by clicking yes or no.

STAGE 2 – Actions for Line Manager and Appraisee

Holding the appraisal meeting

This meeting is essential to an effective appraisal

Step 1 - Before the meeting the Line manager will review the appraisee's appraisal form.

Step 2 - The line manager will then organise an appraisal meeting to discuss the information entered onto PeopleNet in the relevant section and agree the final rating.

Any objectives that were not completed from the previous year should be carried forward in the Looking Forward objectives.

Step 3 - Setting Looking Forward Objectives (action for both line manager and appraisee)

Objectives must be **SMART**:

Specific – ***What*** is it that you will be doing? *Hint: Include a verb (e.g, evaluate, prepare, develop etc)*

Measurable - ***How*** will you know that this has been achieved? *Hint: describe the performance standard that tells you that this has been effective.*

Achievable - *Is this a **stretching and challenging goal within the person's capacity and capability?** Hint: Have a joint discussion to check this.*

Relevant - *Explain how this objective relates to and supports the **departmental plans**.*

Time-bound - ***When*** will this be done by?

Examples of SMART Objectives

Objective	Expected Outcome(s)	Target Date	Any support required to help you achieve this?
<i>To prepare a service 'Procedures Manual' for (service name) by (date) and for the document to be continually updated.</i>	<i>A detailed Procedures Manual for the service is produced and regularly updated that can be used as a point of reference by the whole team.</i>	<i>(date)</i>	<i>Regular meetings with the (service name) team.</i>
<i>To present a paper at the University's Teaching, Learning and Assessment Conference on the institutional enhancement theme of (subject area) by the end of the (date) academic year</i>	<i>The paper is presented at the conference using visual aids and made available for reference by colleagues following the presentation.</i>	<i>(date)</i>	<i>Attend a conference on the institutional enhancement theme. Seek support and guidance from the Teaching and Learning team.</i>
<i>Clear delivery bays daily of all waste and other material within 30 minutes of the delivery vans leaving, supporting the Department's objective to continuously improve the Campus environment for students and staff.</i>	<i>Substantial reduction in visibility of waste following scheduled and unscheduled deliveries, improving the Campus environment.</i>	<i>(date)</i>	<i>For this to be a shared objective with other team members and for time to be made available to undertake refresher training on manual handling.</i>
<i>(Values related) Acknowledge people who come in to the department with a smile and ask how you can help.</i>	<i>Support the embedding of our values through creating a culture of inclusiveness.</i>	<i>(date)</i>	<i>None.</i>

Step 4 – Development & Growth and Career Development

This section is about having a good quality conversation about development needs and the support needed to enable progression so that we maximise the potential of all staff at St Mary's.

The Appraisee can add suggestions for development they would find beneficial to the appraisal form ahead of the meeting, and these should be discussed during the appraisal, as well as support needed from you as the line manager (e.g. supporting their application for qualification funding or a development programme at St Mary's).

The Appraiser should also discuss development needs you believe would be beneficial to the Appraisee to support delivery of their objectives or career aspirations. Development activities are not restricted to training courses and may include opportunity to participate in projects, exposure to new areas/experience, coaching, mentoring, activity related to professional associations, line management support or any other appropriate activity with a view to enhancing the skills, knowledge and behaviour required to support individual development and future performance.

You can find information about the [development opportunities available at St Mary's here](#).

Academic Staff: The areas of Teaching, Research, Enterprise, Professional practice and Administration may be useful to reflect upon/inform discussion on future professional development.

STAGE 3 - Post meeting (see page 21 – 23 for Manager guidance)

Following the appraisal meeting the appraisee should complete the rest of the form based on the discussion that was had at the appraisal meeting.

If the appraisee has more than one position/manager all managers should contribute to the Appraisal Form before it is submitted.

Submitting the Appraisal

Once the appraisee has entered their objectives, rating and comments into the online appraisal form the appraisee can press the 'submit' button. Submitting the form sends an email notification to the line manager/appraiser asking them to complete their part of the form.

The appraiser can now access the form, add comments and the final rating as discussed in the appraisal meeting. Nothing should come as a surprise at this stage and it might be helpful to come to the meeting with a draft of your comments. Once the appraiser is happy with their comments then they should submit the final form.

PEOPLENET GUIDANCE FOR APPRAISEE

Completing your appraisal online via PeopleNet (iTrent) will enable you to add information and objectives on your appraisal form without having to complete paper forms as well as providing you with access to your Line Managers comments. A great feature of having online appraisals is that it allows you access to your objectives, appraisal and all personal and job-related details from one location. To support this written guide, an online video guide is available to help you navigate your way through the system and can be found on the website under 'Appraisal and Review' on the [HR Forms, Policies and Procedures page here](#).

SECURITY

As PeopleNet includes some very sensitive information about you, it is important that you ensure the security of your personal information is maintained. You should therefore always log out of PeopleNet once you have finished using it and should never let anyone know your username & password.

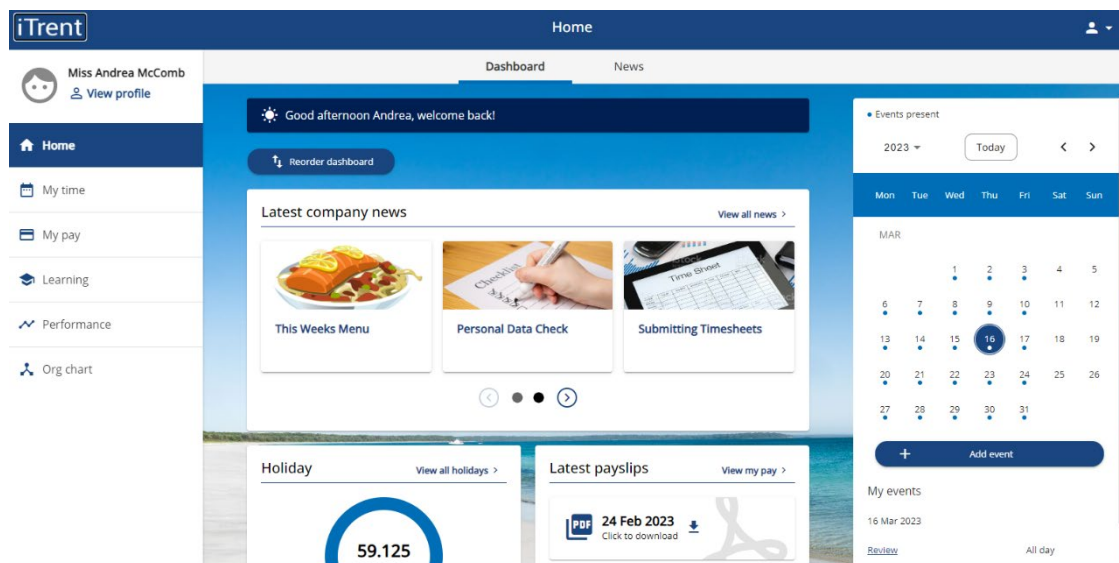
If you notice any incorrect information on the system which you cannot correct yourself, please contact HR Systems team hrrsystems@stmarys.ac.uk

HOW TO ACCESS PEOPLENET

You can access PeopleNet from any internet connected computer device. You can access it via your St Mary's computer or device, your own home computer, laptop, tablet, iPad, iPhone or Smartphone.

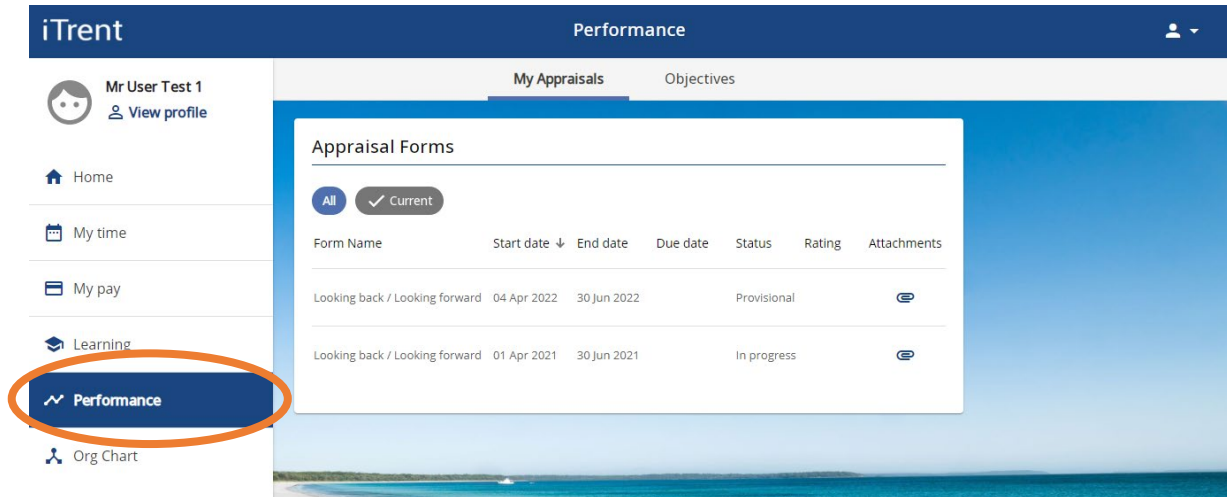
- Go to URL https://ce0230li.webitrent.com/ce0230li_ess

Once you have cleared Multi Factor Authentication you will be logged straight into the PeopleNet Platform as shown below:



1. NAVIGATION OF PEOPLENET

The Menu Tabs at the left-hand side of the page take you to various areas in Employee Self Service (ESS) relating to your personal details and employment. To add objectives or view your Appraisal Form, click on the **Performance** tab.

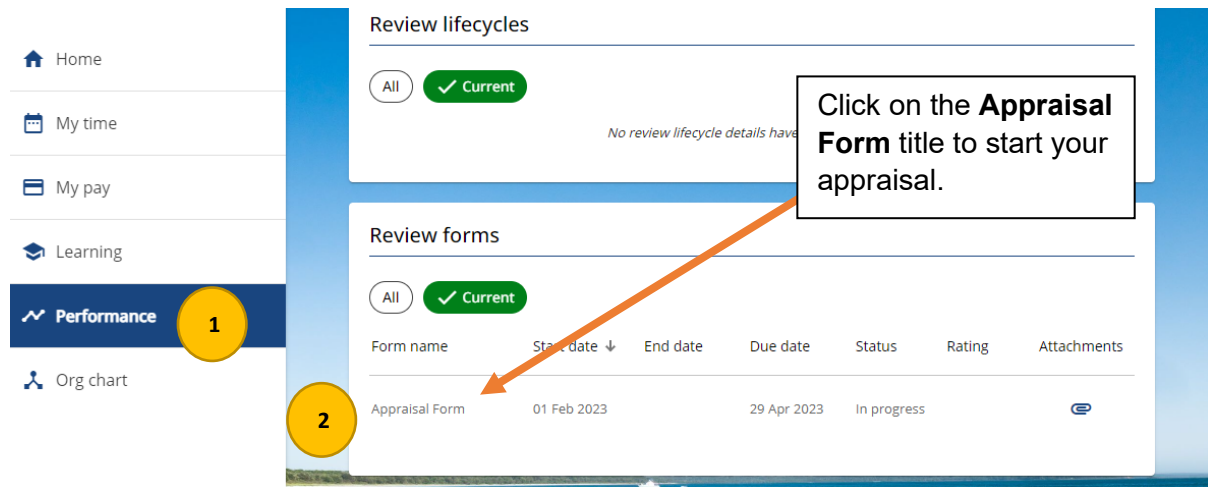


1.1. ICONS AND BUTTONS KEY

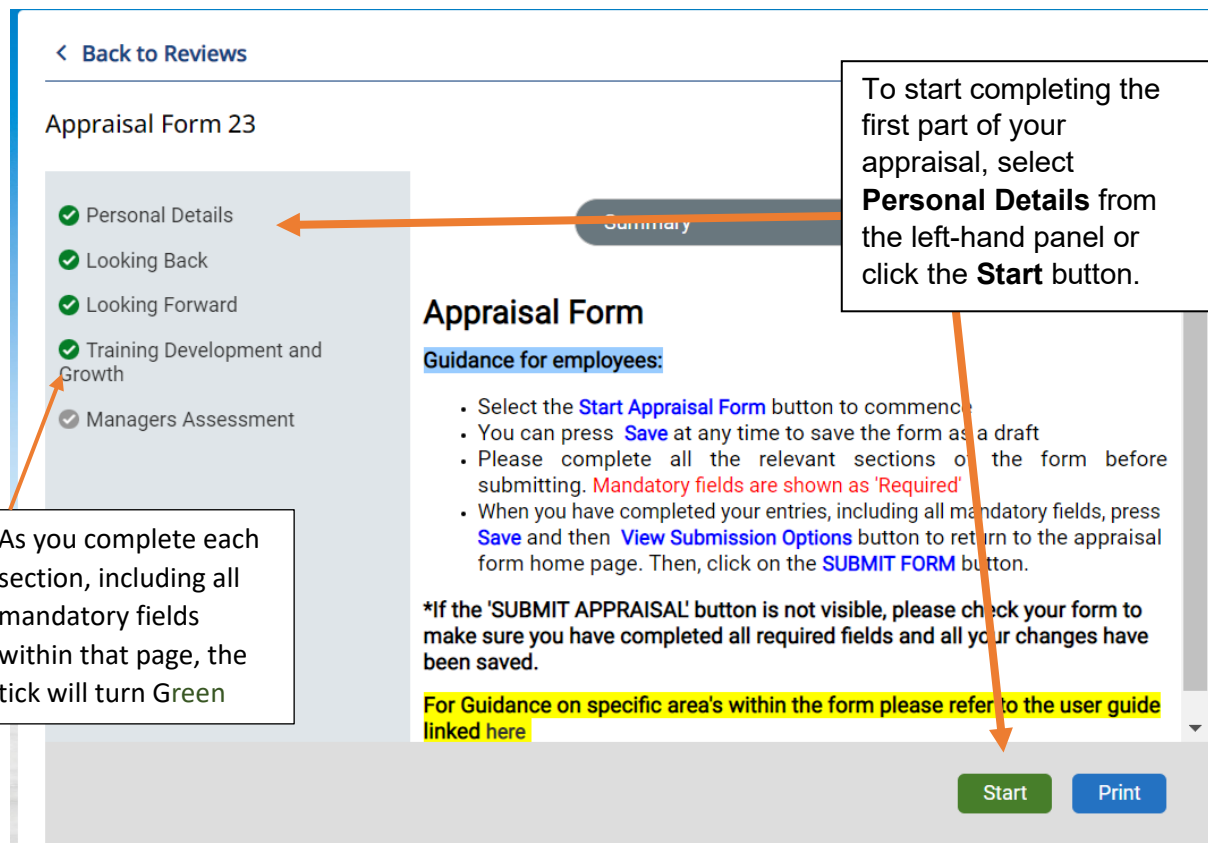
Icon/ Button	Name	Description
	Start Form	Click to start the appraisal form
	Download Form	Click to download a PDF of your appraisal form
	Save draft	Click to Save new or edited data
	Return to Summary page	Click to go to the summary page and view all sections of the appraisal
	Submit button	Click to submit your appraisal
	Delete button	Delete a record card
	Previous button	View previous section
	Next button	View next section
(Required)	Required	Indicates a Mandatory field
	Back	Close current window and go back to PeopleNet homepage
	Incomplete	Indicates a section/mandatory field has not been completed
	Complete	Indicates a section has been fully completed
	In progress	Indicates a section is in progress
	Document viewer	Select to View/Select data record
	Paperclip	Select to View/attach a document E.g. Upload evidence of training/development

2. COMPLETING YOUR ONLINE APPRAISAL FORM

You should already have an Appraisal Form available under the **My Appraisals** tab of the **Performance** menu.



Clicking into the Appraisal title will load your appraisal form on a new page.



3. Completing each section

The **Personal Details** section - ensuring that your personal details are correct and you enter in the date of your appraisal meeting with your line manager as shown below:

NB: Any fields marked with **(required)** are a mandatory field. You can save the form at any time and return to it later.

Appraisal Form (Personal Details) (1 of 6)

< Personal Details >

Select this icon to add or maintain review action

Personal Details

Preferred name
Andrea

Surname
McComb

Review date (editable)
16/03/2023
(required)

Previous Save Summary Next

Select the date of your appraisal by clicking on the calendar

Throughout the form you can save at any time by clicking on **SAVE** or Return to the Summary screen by clicking on **SUMMARY**. To Move through the form, click on the **NEXT** Button to get to the next section

The **Looking Back** section of your appraisal form covers three key areas:

- **Looking Back Objectives** - List your last year's objectives and provides a self-assessment against each objective.
- **Comments and reflections** - Rate your overall performance in the last year and add your comments and reflections discuss how you have embodied the University Values in the last year
- **Performance Rating** - Rate your performance between 1-5

The **Looking Forward** section of your Appraisal Form covers your next year objectives

- **Objectives and Priorities** - identify up to 5 agreed objectives/priorities for the next year, these objectives should be set in discussion with your Line Manager. The objectives should be SMART in format, embody the unique mission and values identified in Vision 2030, and support your Departmental objectives

The **Training Development and Growth** section covers 3 key area's:

- **Career Development** - capture discussions on future career development discussions at the meeting with your line manager.
- **Training and Development** – select a training need you have identified and discuss why you would like to do it and how the development will be funded
- **Training and Development Continued** – Confirm if you have completed the essential training modules or if you have a personal research plan

Essential Training - All staff at St Mary's University are expected to remain up to date on essential training, as identified in the university's Essential Skills Matrix. The Essential Skills Matrix sets out required training all staff must complete to ensure they are compliant with relevant regulation and legislation. You can find a list of the training required for your role in the [Essential Training Matrix](#).

Personal Research Plan- Non-Academic staff: Select 'Not applicable' from the drop down menu.

Academic staff: Progress against the Personal Research Plan (PRP) should be assessed as part of the annual appraisal process. Refer to PRP guidance **here** to help you complete the next question. Refer to the **Academic Career Pathway** to support conversations about career development. Use the criteria listed to identify skills gaps and agree aspirations and development needs in the relevant sections of this form.

Next Steps: Submission:

Once you have made all the entries that you wish to make and completed all mandatory fields of the form, click the **STEP 1: Save** button and then **STEP 2: View submission options** button to return to the summary page and **Submit** your appraisal. Please note you should only submit your appraisal once objectives have been agreed.

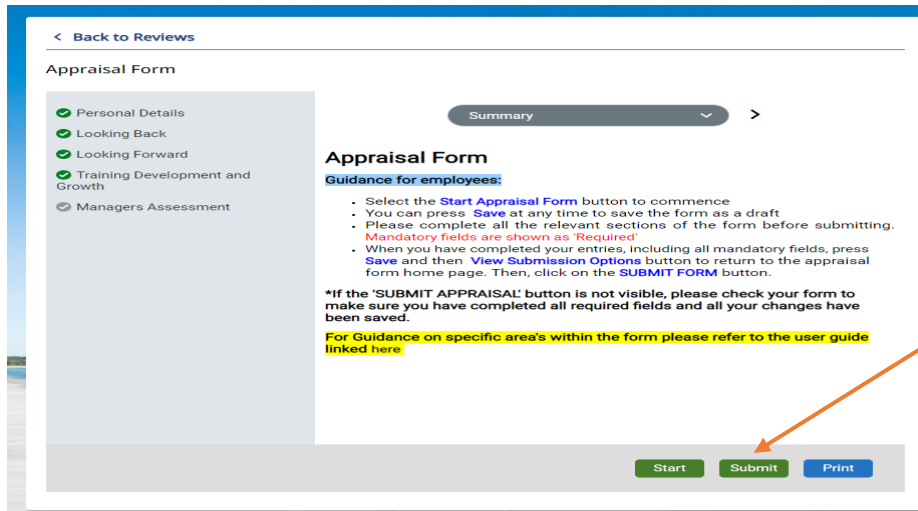
The screenshot shows the 'Next steps' section of the appraisal form. It includes a 'Submission' heading and a list of instructions. Two yellow circles, labeled '1' and '2', highlight the 'STEP 1: Save' and 'STEP 2: View submission options' buttons in the navigation bar at the bottom. A callout box points to the 'STEP 1: Save' button with the text: 'Click STEP 1: Save to add the objective to your appraisal'. Another callout box points to the 'STEP 2: View submission options' button with the text: 'STEP 2 to go back to the summary page and submit your appraisal'.

3.3. SUBMITTING YOUR APPRAISAL

When the appraisal Summary has loaded, and if all mandatory questions have been completed, a **Submit Form** button will be available.

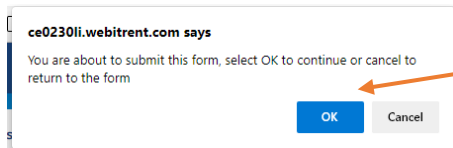
Once you have submitted the Appraisal form no changes can be made and your line manager will be notified of the submission.

Once submitted, a message will pop up to confirm the submission. Click **OK** to continue with your appraisal submission. The page will reload confirming that 'your form has been submitted'.

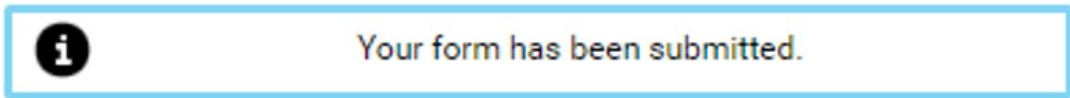


NB: You must discuss the content of your appraisal form with your Line Manager before

Click **Submit Form** to submit your appraisal.



If you do not need to make any changes please click on okay. This will submit your form



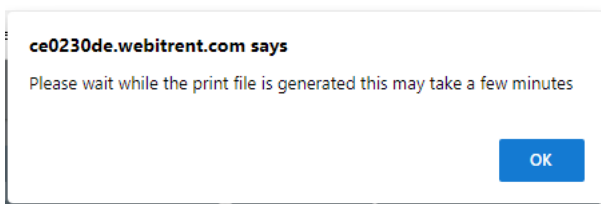
Once Submitted your form will provide you with the notice that it has been submitted. You will receive an email notification and so will your line manager letting them know they can enter there rating and reflection.

3.4. DOWNLOAD YOUR APPRAISAL AS PDF

To download all the sections of your completed appraisal form as a PDF document, click on the **Print** button on the Summary page.

The screenshot shows the 'Appraisal Form' interface. On the left is a sidebar with a progress list: Personal Details (checked), Looking Back (checked), Looking Forward (checked), Training Development and Growth (checked), and Managers Assessment (unchecked). The main content area is titled 'Appraisal Form' and shows a 'Summary' dropdown menu. Below the title is a 'Guidance for employees:' section with a bulleted list of instructions. At the bottom of the main content area are three buttons: 'Start', 'Submit', and 'Print'. An orange arrow points from a callout box to the 'Print' button. The callout box contains the text: 'Click **Print** to download your appraisal.'

A pop-up window will appear, click OK to save the file into your Downloads folder.



PEOPLE MANAGER GUIDANCE

Completing appraisals online via People Manager will enable you to review your employee's comments and objectives on their appraisal form without having to complete paper forms as well as providing you access to enter your comments on the appraisal form. A great feature of having online appraisals is that it gives you access to your employee's objectives, appraisal and all personal and job-related details all in one location.

The following functionality will be available for People Managers:

- View your employee's appraisal
- Submit your comments on appraisals
- Run development reports i.e. Appraisal completions.

SECURITY

As People Manager includes some very sensitive information about your employee, when you have finished using People Manager please always ensure that you logout. It is also important that you **never let anyone else know your username and password** as this information would allow people to access information on you and your staff, exposing a risk of identity fraud.

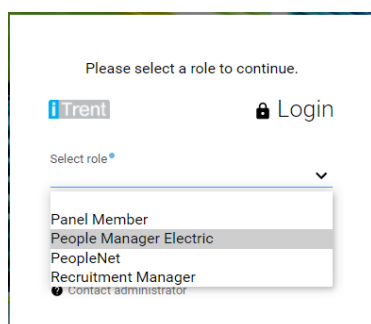
If you notice any information stored on the system is incorrect, please contact the HR Systems team hrrsystems@stmarys.ac.uk

HOW TO ACCESS PEOPLE MANAGER (iTrent)

You can access People Manager from any internet connected computer device

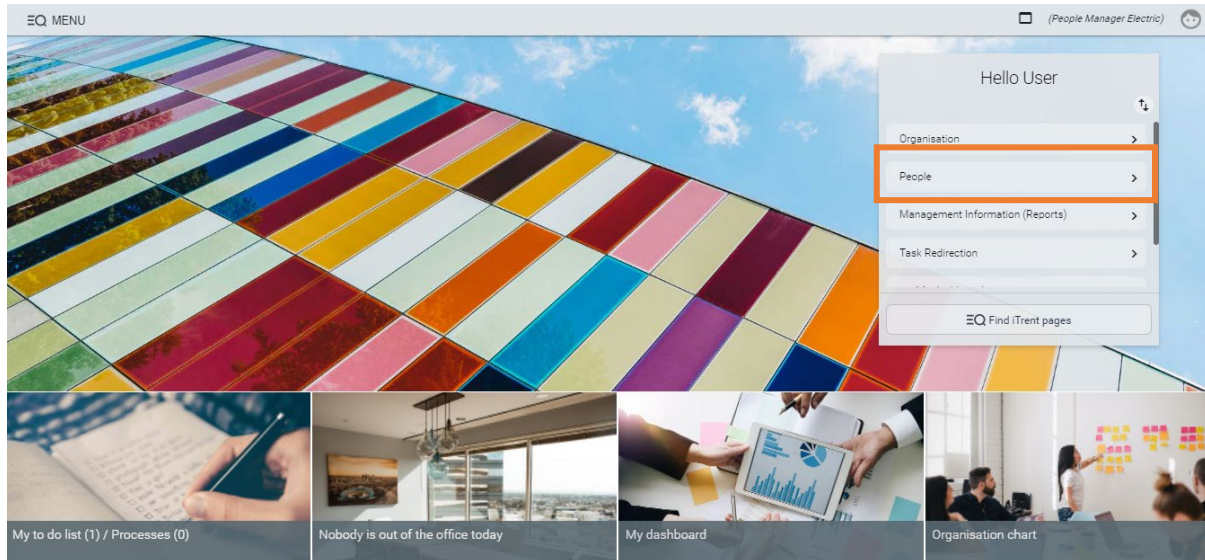
- Go to URL
https://ce0230li.webitrent.com/ce0230li_web/wrd/run/etadm001gf.open

The login screen will refresh to allow you to select which role you want to access. Select **People Manager Electric** from the drop-down menu provided.

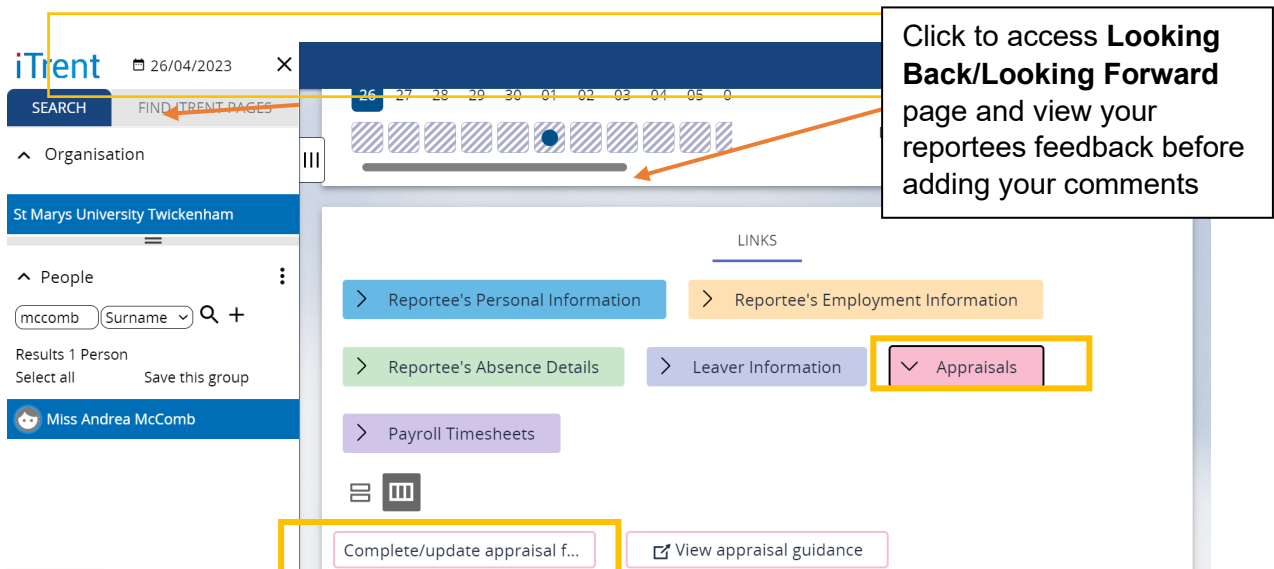


3. NAVIGATION OF PEOPLE MANAGER

Once you have logged into People Manager, you will be taken to the Home Page. If your reportee has submitted their appraisal form, you will receive an email notification letting you know that you can add your comments via People Manager on iTrent. To view a direct reports appraisal form and submit your comments, click on the **“People”**.



Next, Search for the employee you are looking to view. Once loaded scroll to the links at the bottom of the screen and choose the folder **“Appraisals”** and then click on the first link **“Complete/Update Appraisal”**



Once loaded, the page will display the “**Appraisal Home Page**” as shown below

If you wish to review your staff members feedback before recording your rating/comments, click into each of the sections on the left-hand side as shown below.

Can view each section by clicking on the links or using the grey dropdown in the middle of the screen.

Performance review form Appraisal Form 23

- ✓ Personal Details
- ✓ Looking Back
- ✓ Looking Forward
- ✓ Training Development and Growth
- ☐ Managers Assessment

Summary

Appraisal Form

Guidance for employees:

- Select the **Start Appraisal Form** button to commence
- You can press **Save** at any time to save the form as a draft
- Please complete all the relevant sections of the form before submitting. **Mandatory fields are shown as 'Required'**
- When you have completed your entries, including all mandatory fields, press **Save** and then **View Submission Options** button to return to the appraisal form home page. Then, click on the **SUBMIT FORM** button.

3.1. MANAGERS COMMENTS

Once you have reviewed the form, click into the **Managers Assessment** section from the left-hand side links as shown below to enter your comments and rating.

Performance review form Appraisal Form 23

- ✓ Personal Details
- ✓ Looking Back
- ✓ Looking Forward
- ✓ Training Development and Growth
- ☑ Managers Assessment

Summary

Appraisal Form

Guidance for employees:

- Select the **Start Appraisal Form** button to commence
- You can press **Save** at any time to save the form as a draft
- Please complete all the relevant sections of the form before submitting. **Mandatory fields are shown as 'Required'**
- When you have completed your entries, including all mandatory fields, press **Save** and then **View Submission Options** button to return to the appraisal form home page. Then, click on the **SUBMIT FORM** button.

Once loaded, the page will display the **Managers Assessment** page as shown below. You can **enter your comments** on the text box provided and also enter the **overall performance level** (scores between 1 and 5) on this page.

Managers Assessment

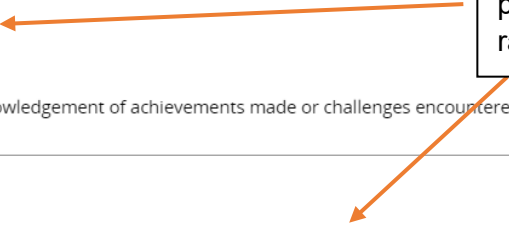
As Line Manager, please rate how you think the Appraisee has performed overall using the ratings below. Guidance on rating definitions can be found on Staff Appraisal Process Guidance (Page 5). Please enter your comments in the space provided below.

*If the reportee has more than one position/line manager, please ensure that all line managers contribute to the Comments box below before submitting the form.

How do you think the appraisee has performed overall? ●

Overall comments and reflections - including acknowledgement of achievements made or challenges encountered over the last year ●

Enter your comments and Select the performance rating here



Once you have entered your comments and selected the overall performance rating, click on the **Save** button at the bottom of the page and continue with the form submission as shown below in the final submission steps.

3.2. FINAL SUBMISSION

If all mandatory questions have been completed and all Line Managers have entered their comments in the **Managers Comments** page, the final Line Manager to complete their comments can submit the form.

1. To submit the form, click on **Save**, then **Summary** button to view for submission options

Submission Steps


Submission Guidance for managers:

Thank you for completing your part of the appraisal form. If all mandatory questions have been completed and all Line Managers have entered their comments above, the final Line Manager to complete their comments can submit the form.

1. To submit the form, click on **Save**, then **Summary** button and select the **SUBMIT** button which will only become available on the Summary page when all fields are completed, otherwise the form will only remain as a draft
2. Go back to your People Manager task list and 'Authorise' the form submission

***If the 'SUBMIT' button is not visible, please check your form to make sure you have completed all required fields and all your changes have been saved. Once submitted your entries cannot be change**



2. Once the Summary page has loaded, select the **SUBMIT** button which will only become available on this page when all fields are completed and all sections of the form have a green tick icon  next to it as shown below, otherwise the form will only remain as a draft.

Performance review form Appraisal Form 23

Summary

Appraisal Form

Guidance for employees:

- Select the **Start Appraisal Form** button to commence
- You can press **Save** at any time to save the form as a draft
- Please complete all the relevant sections of the form before submitting.
Mandatory fields are shown as 'Required'
- When you have completed your entries, including all mandatory fields, press **Save** and then **View Submission Options** button to return to the appraisal form home page. Then, click on the **SUBMIT FORM** button.

*If the 'SUBMIT APPRAISAL' button is not visible, please check your form to make sure you have completed all required fields and all your changes have been saved.

For Guidance on specific area's within the form please [guide linked here](#)

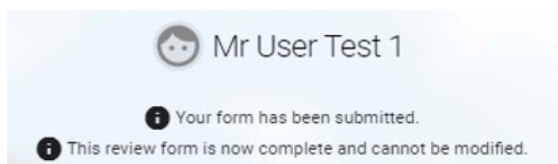
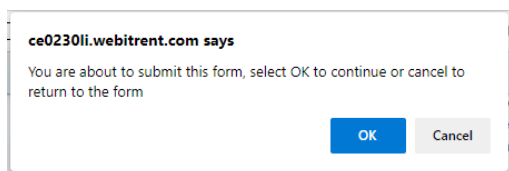
3

Start Submit Print

If all sections have been completed with a green tick next to it, then the **SUBMIT** button will be available at the bottom of the screen.

Click **SUBMIT** to submit your comments. **Once submitted your entries cannot be changed**

A window will pop up to confirm the submission, click **OK** to continue with your submission*. The page will reload confirming that *'your form has been submitted'*.



***Once you have submitted the form you cannot make any changes.**

Your reportee will also receive an email letting them know their appraisal form has been updated with managers comments.

You have now completed the online appraisal form with your employee.

Appraisal FAQs

Appraisal FAQ's – 2023 Window

Q – What's new?

The Operational Enhancement Programme survey highlighted that the system for completing the online appraisal form was inefficient and difficult to use. We have listened to this feedback and made a number of changes to the form. The main changes are:

- The Looking Back/ Looking Forward Objectives are now in a free text box format. There are no complicated date or completion boxes that need to be filled out and the new format aligns with the paper appraisal form.
- The form is split into small sections and a small tick symbol will turn green on the summary page to show you which sections you have completed.
- University Values have been incorporated into the looking back reflection rather than in separate boxes.
- The same online form is visible to Appraiser and Appraisee so the confusion of version control is removed
- Workflow reminders enable both parties to see what action is required of them after the initial appraisal conversation preventing delays in completing the process

Q – Why do we need to have a face to face meeting when we can complete the form online?

A – The online appraisal form is purely to record the outcome of a good quality appraisal conversation. The face to face conversation is essential to helping staff do their best and for relationship building. The conversations allow managers and staff to listen to one another, provide personalised development and deepen rapport.

Q – What are the key appraisal dates?

A – The Appraisal Window will go live on 15th May 2023 for SLT and their direct reports. The Window for all other employees will go live on 1st July 2023 until 31st August 2023. This is to allow organisational objectives to filter down through the management and department/structure levels.

Q – I am still in my probation period do I need to use the new system to record anything?

A- No, however once you have completed your probation you can add your objectives for the coming year onto the appraisal system so they are visible when you have your first appraisal. You will just need to input some text (eg "N/A", "not applicable still in probation") into the mandatory fields for the 'looking back' section so that the form can be submitted to your line manager. Please note the below dates:

- Professional services staff who joined from 1st February 2023 do not need to complete an online appraisal this year as you will still be in probation.

- Academic staff who joined from 1st July 2022 do not need to complete an online appraisal this year as you will still be in probation.

Q – Who will use the Performance Management module in PeopleNet?

A – All University employees will be expected to use PeopleNet for recording appraisals via their Employee Self Service pages .

A – All Managers will be expected to use PeopleNet for recording appraisals via the Manager Self Service pages (People Manager).

Q – How do I access the system if I don't use a computer at work?

A – The system can be accessed from any device that has an internet browser (i.e. Laptop, Home PC, Tablet and some large screen smartphones). For those staff who don't own any such device, you will be provided with access at work so that you can submit your appraisal. Please liaise with your manager to decide how the information can be recorded online.

Q - I have an employee who has more than one line manager. How will this work?

A – Both managers will be able to log in to People Manager and view their employee's appraisal and make comments. They will, however, need to liaise with one another to finalise the rating and to agree who does the final submission of the form.

Q – What's expected of me as a line manager?

A – In discussion with your employee, you should provide comments on how you feel the employee has performed against their objectives for last year. Has the employee completed all of their objectives? Are some still outstanding? Your input at this stage is important to enable the employee to complete their 'Looking Back' and 'Looking Forward' sections of the appraisal before submitting the forms.

Your comments here will help inform the overall performance rating for the employee. You will also be required to provide an overall comment on how the employee has performed against the University's values.

Q - What if I don't have time in the cycle to complete my appraisal?

A - If you cannot complete your appraisal in the allotted timeframe please speak to your line manager. In order for you to be able to do your job effectively and be clear on what you need to be working on in the new academic year, you must have completed the appraisal process by the end of August. It's important to reflect back on the previous year as this will help to inform what support/development will be required to achieve your objectives in the coming year. The appraisal cycle takes place over a few months so everyone should have the opportunity to complete their appraisal within this timeframe.

Q – Once I have submitted my appraisal can I make changes to it?

A – Once you have pressed ‘Submit’ there is no option to make further amendments to the online form. Before you submit your form we suggest reviewing to make sure you are completely happy with it.

Q- What happens if I get a new line manager halfway through my appraisal year?

A - If you get a new line manager, either because your line manager has left the University or one of you has transferred to a different position, your new line manager will be able to see all of your current and historical appraisals and content within them that are attached to your profile within ESS.

Q- As a line manager, what access will I need?

A- You will need a People Manager role to access your employee’s details on the HR system. If you do not already have this access you can contact HRHelpdesk@stmarys.ac.uk to request access.

Q- How do I access my employee’s appraisal form?

A- You can access and view your employee’s appraisal form once the appraisal window opens in July 2023. You can gain access to the form through the people manager profile, selecting your employee and selecting ‘appraisal’ at the bottom of the screen. You can now access the form throughout the appraisal cycle in a read only format.

Q- When can I start adding comments to the appraisal form?

A- You will receive an email notification from HR Systems to confirm when you can start adding manager’s comments to the appraisal form. This notification will be sent once your employee has completed and submitted all mandatory sections of the appraisal form.