

Summary

Objective

The process of:

- An employee completing a self evaluation,
- A people leader reviewing and finalizing the outcome,
- A people leader communicating these outcomes with the employee.

Owner [Out of Scope]

Expert [Out of Scope]

Procedure

1.0 Communicate upcoming and required actions

HR Help, Remuneration Advisor

a In Te Kahu, set the review period so that the performance documents can be created.

b Complete the goal performance process.

NOTE What if the status is still displaying 'Running'?

Click on the arrow next to 'View Log' which will show the current status.

c Send email to all employees advising performance documents are ready.

2.0 Complete self evaluation

Employee

a In Te Kahu, open performance documents and complete self evaluation.

 QRG - Completing Performance Evaluation


NOTE What if you would like someone to provide feedback?

In Te Kahu, complete the following fields under the "Request Feedback for Me" section in the Feedback tab:

- Who do you want to ask?
- Share feedback with manager
- Questionnaire (select)
- Additional Questions
- Provide Feedback By
- Message

NOTE What if you want to review feedback given to you?

Navigate to the "Feedback Given to Me" section.

 QRG - Requesting and Reviewing Feedback

b Save the "Self Evaluation".

3.0 Conduct performance conversation

People Leader

a In Te Kahu, review all relevant information for the employee.

NOTE What is the relevant information for an employee?

- Feedback received for the employee.
- Employee self evaluation.

b Conduct the performance conversation with the employee.

c In Te Kahu, update the performance ratings for the employee. (Do not click submit as this will share the rating with the employee.)

d Attend moderation session.

NOTE What happens if a rating needs to be changed during moderation?

Update the rating in Te Kahu. You may now click submit and your employee will see the rating.

NOTE What if there was additional information needing to be captured after the rating has been submitted?

Contact HR help

e Conduct the outcome conversation with the employee.

NOTE What if employee wants to dispute an outcome?

See link for review process and carry on to step 4.0.

 QRG - Check-ins

4.0 Send rating review letter to manager

HR Advisor

a Generate manual letter to confirm the outcome of the review.

NOTE Populate the amendment of Rating & Remuneration following review letter - if required.

Saved in (I:\humres\Talent Advisory Services Team\Team Tools & Resources\Letter Templates\3. Change to employment terms).

b In Outlook, email letter to manager.

c In Te Kahu, update approved rating change.

5.0 Discuss review with employee

People Leader

a Review the letter from HR Help.

b Sign and provide a copy to the employee.

c In Outlook, send a signed copy to HR Help.

6.0 Update details

HR Advisor, Remuneration Advisor

a In Te Kahu, search for the employee by their name or person number and update their details.

NOTE How do you update an employees details?

- Select the "My Client Groups" option under the "Person Management" tile.
- Select the 'Actions' icon at the right-hand side of the relevant employee's row, then Personal and Employment > Document Records.
- Click the 'Add' button, select the appropriate 'Document Type', then complete all the necessary fields, including the 'Attachments' section. Click 'Submit' to save the record.