PERFORMANCE REVIEW GUIDELINES – USING eP2P SYSTEM (STAFF)

Prepared by,

Performance & Rewards Management
Human Capital
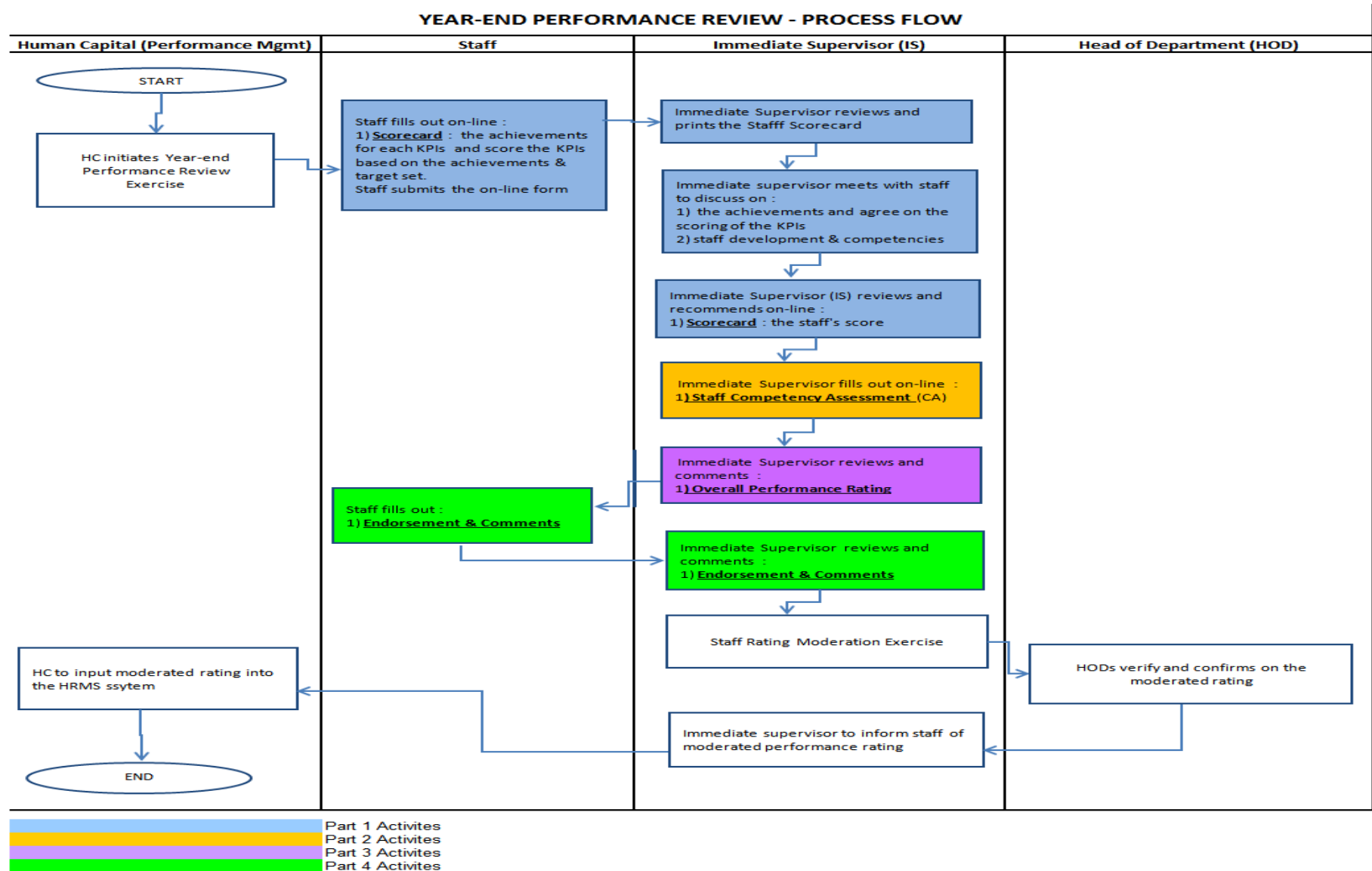**Kuwait Finance House (Malaysia) Berhad**

Agenda

1. Year-End Performance Review – Process Flow & Summary by Using e-Appraisal

2. e-Appraisal Forms – Guidelines & Screenshots

   ✓ Part 1 – Scorecard Evaluation
   ✓ Part 4 – Endorsements & Comments

Year-End Performance Review - Process Flow by Using e-Appraisal

YEAR-END PERFORMANCE REVIEW - PROCESS FLOW

Human Capital (Performance Mgmt)	Staff	Immediate Supervisor (IS)	Head of Department (HOD)

START

HC initiates Year-end Performance Review Exercise

Staff fills out on-line :
1) **Scorecard** : the achievements for each KPIs and score the KPIs based on the achievements & target set.
Staff submits the on-line form

Immediate Supervisor reviews and prints the Stafff Scorecard

Immediate supervisor meets with staff to discuss on :
1) the achievements and agree on the scoring of the KPIs
2) staff development & competencies

Immediate Supervisor (IS) reviews and recommends on-line :
1) **Scorecard** : the staff's score

Immediate Supervisor fills out on-line :
1) **Staff Competency Assessment** (CA)

Immediate Supervisor reviews and comments :
1) **Overall Performance Rating**

Staff fills out :
1) **Endorsement & Comments**

Immediate Supervisor reviews and comments :
1) **Endorsement & Comments**

Staff Rating Moderation Exercise

HODs verify and confirms on the moderated rating

HC to input moderated rating into the HRMS ssytem

Immediate supervisor to inform staff of moderated performance rating

END

Part 1 Activites
Part 2 Activites
Part 3 Activites
Part 4 Activites

2

Year-End Performance Review - Process Summary by Using e-Appraisal

❖ Individual staff's actions are only required in Part 1 – Scorecard Evaluation and Part 4 – Endorsements & Comments
❖ Each part must be completed with approvals before proceeding to the next part

My Scorecard Form		Staff	Immediate Supervisor (IS)	Head of Division (HOD)
Part 1	Scorecard	Evaluate	Review, Edit & Recommend	Approve

My Annual Performance Appraisal		Staff	Approver (Immediate Supervisor - IS)
Part 2	Competency Assessment	NA	Evaluate
Part 3	Overall Performance Rating	NA	Fills out Comment
Part 4	Endorsements & Comments	Comment	Review & Comments

NA	No action required

Using e-Appraisal Forms

Explanation on the forms based on Process, referenced the eP2P Screenshots on Annual Performance Review

Part 1

Scorecard Evaluation

Staff Key-in Results & Scores and Submit the Scorecard

Scorecard Evaluation – Scoring Guidelines

❑ Only Scorecard which has been approved is allowed for evaluation.

❑ Staff evaluates the scorecard :
a. Results – Staff to key in the results achieved.
b. Score – Evaluate against the targets set, staff to key in the Score

The following KPI Achievement Scoring is used:

Achievement Scale	KPI Achievement Score
Over Achieved Stretched Target	150
Consistently Meeting Stretched Target	125
Consistently Meeting Target	100
Consistently Meeting Threshold Target	75
Under Achieved Threshold Target	50

Note : Other scores besides the above table will not be acceptable eg. 110 or 120

❑ After the one-on-one performance discussion, Immediate Supervisor recommends the scorecard via the review and approve function

Scorecard Evaluation – Key-in Performance Results & Score

- **Results -** Staff to fill out the actual results achieved, referenced the targets.

- **Score** - Staff to fill out the score based on the scoring guidelines
  Example :

Measure	Threshold Target	On Target	Stretched Target	Results	Score
Division PBT (25 mil)	>10 to 15 mil	>15 to 25 mil	>25mil to 35 mil	38 mil	150
% Compliance to SLA	>65 to 75 %	>75 to 85%	>85 to 95%	70% achievement	75
% Achievement of Training Plan	Some Achievement in training execution	100% training plan achievement	100% training plan achieved plus some knowledge sharing in the work areas	Did not attend any training	50
No of Successful cross selling	1	2 - 4	5 - 8	6 Successful referrals	125

Staff to fill out these 2 columns

Staff **views** his / her Scorecard

Scorecard Planning must be "Approved" before you begin with the Scorecard Evaluation

Ensure that your Scorecard Planning status is **"Approved"**

Please click this button to begin evaluation

In case where below pop-up message appears,

Kindly select **"Proceed" button** in order to proceed with Year-End Scorecard Evaluation.
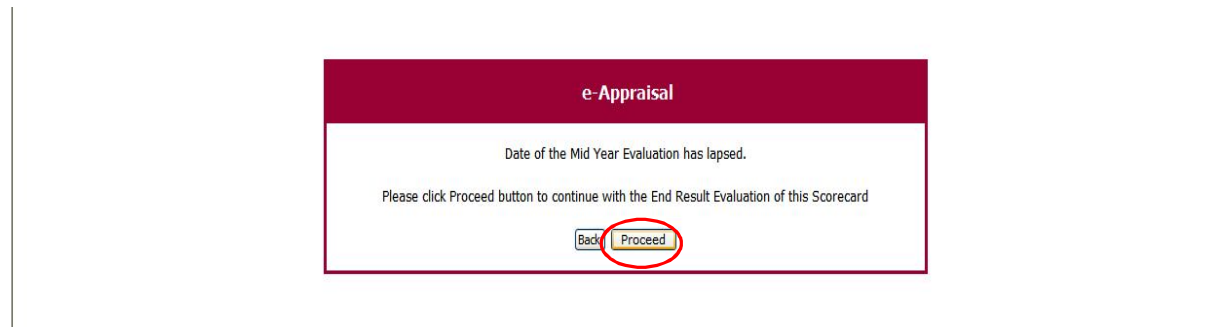
Next select **"Evaluation 1 – Skipped"** and subsequently select the **"Evaluate" button**.

Staff proceeds with evaluation by filling out the "Result" & "Score" columns

Staff submits the evaluated scorecard

Staff can view the evaluated scorecard at anytime

Staff to print a copy of the evaluated scorecard for One-on-One performance discussion with Immediate Supervisor

Part 4
Endorsements & Comments

1) After Immediate Supervisor completes the Annual Performance Appraisal

(Competency Assessment, Overall Performance Rating)

2) Staff puts in his / her Endorsement & Comments

Endorsements & Comments – Guidelines

❑ Staff has the option to agree or disagree with the performance evaluation

❑ Staff puts in his / her comments & feedback on the evaluation
(e.g. state the supports and feedback on how performance can be improved or state challenges / constraints in achieving performance)

❑ Immediate supervisors reviews the staff's comments and put in his / her comments and feedback

❑ Immediate supervisor previews and submit the form

Staff access e-Appraisal - My Annual Performance Appraisal

Staff choose the current performance period

Staff fills out the Endorsement & Comments

Staff to "Agree" or "Disagree" on the evaluation and to put in his/her comments

1) Staff to "Agree" or "Disagree" with the Overall Performance Rating
2) Staff to put in his/her comments

Please click this button

Staff submits his / her comments

For further information / queries, please do not hesitate to contact the following key personnel at KFHMB, Group Human Capital:

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Thank you