



PERFORMANCE REVIEW GUIDELINES – USING eP2P SYSTEM (STAFF)

Prepared by,

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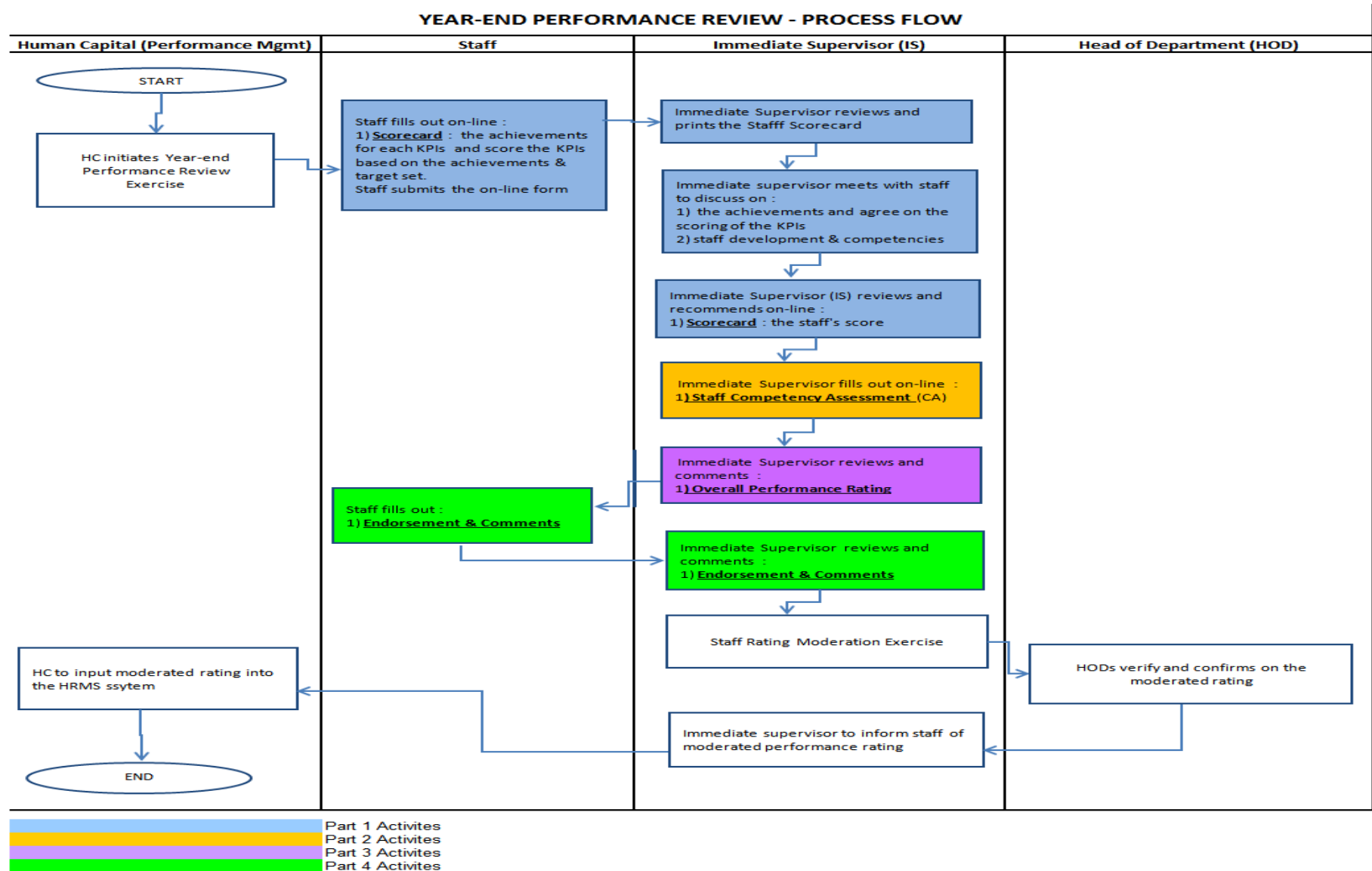
Agenda

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 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





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

e-P2P Applications
HR Self Service

expert user::

alert | review | announcement | message | home | logout | help |

Info

HR Self Service

- e-Claims
- e-Data
- e-Financial
- e-Forms
- e-Leave
- e-Policy
- e-Posting
- e-Time
- e-Training

Industry Specific

- e-Development
- e-Loan
- e-IR

Company Specific

- e-Appraisal
- e-Flex Benefits

Personal Information

EID	: 10-937	Name	: 391 391
Job Grade	: C2	Position	: Head, Retention & Rewards
Org. Unit	: Human Capital	Company	: KFHMB
Sub. Unit	: Retention & Rewards	Org. Area	: Headquarters
Date Joined	: 18/11/2010	Date Left	: -
Year of Service	: 2.08 year(s)	Work Status	: Active ; Permanent

e-Appraisal - My Current Performance Evaluation

1. My Probationary Appraisal
2. My Scorecard Form
3. My Annual Performance Appraisal
4. My Subordinates' Appraisal Form
5. My Application Status
6. My Recommender/ Approver/ Expert User

Please click this button

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Scorecard Planning must be “Approved” before you begin with the Scorecard Evaluation

The screenshot shows the 'e-P2P Applications HR Self Service' interface. The main content area displays 'Personal Information' and 'e-Appraisal - My Scorecard Form'. The scorecard form table has the following data:

No	From	To	Phase	Status	On	By	Score	Select
1	01/01/2012	31/12/2012	Planning	Approved	05/12/2012	689 Bin 689	0.00%	Back Evaluate

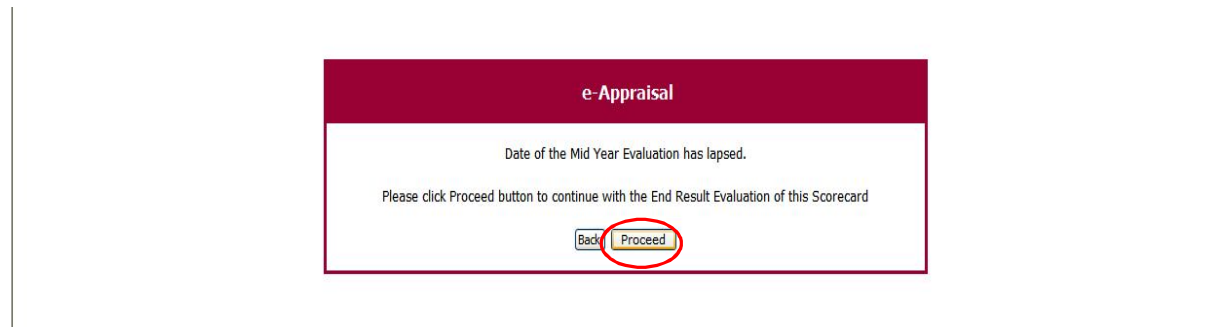
Annotations on the screenshot include:

- A yellow box around the 'Approved' status in the table with the text: "Ensure that your Scorecard Planning status is “Approved”".
- A yellow callout box pointing to the 'Evaluate' button with the text: "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.

No	From	To	Phase	Status	On	By	Score	Select
1	20/08/2014	31/12/2014	Planning	Approved	05/02/2014	1431 Binti 1431	0.00%	
2	20/08/2014	31/12/2014	Evaluation 1	Skipped	05/02/2014	-	0.00%	



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

PERFORMANCE SCORECARD KFHM - Windows Internet Explorer

http://10.20.100.4:8080/cgi-bin/epe_scorecard_form.cgi

File Edit View Favorites Tools Help

PERFORMANCE SCOREC... x eP2P

Kuwait Finance House بيت التمويل الكويتي

Scorecard Form 2012 for All Employees Groups

Form ID : 1350038780 Evaluation Period: Annually

Period From : 01/01/2012 Period To : 31/12/2012 Phase : End Result Status :
 EID : 10-937 Owner : 991 391 Position : Head, Retention & Rewards Company :
 Job Grade : C2 Org Unit : Human Capital Sub Unit : Retention & Rewards Submitted On :

No.	Pers.	Ref	Performance Objectives	Measures	Weightage	Threshold	Target	Stretched	Result	Score
1	FIN	T2FIN1	To effectively manage divisional operational Cost	Operational cost within budget	10	% 0 to 10% above budget	on budget	0 to 10% below budget		%
2	FIN	T2FIN1	To effectively manage divisional operational Cost	% Saving realised	5	% <10% to 5%	<-5% to 5%	>5% to 10%		%
3	CUS	T2CUS	To ensure Customer Delight	Division ICSI	15	% >5.5 to 6.5	>6.5 to 7.5	> 7.5 to 8.5		%
4	IBP	T2IBP1	To improve efficiency and effectiveness of HR Information system	% of reduction in process time from automation of key process	10	% 1 to 5%	>5% to 10%	>10% to 20%		%
5	IBP	T2IBP1	To improve Performance & Rewards Management Processes & system	Policies and Processes meet business requirement	10	% Slightly not meeting	Meet requirement	Better than requirement		%
6	IBP	T2IBP4	To improve efficiency and effectiveness of HR Information system	Improvement of quality and turn-around time for information, analysis and	10	% Not meeting requirements	Consistently meeting	Meeting most requirements		%
7	IBP	T2IBP1	To improve Performance & Rewards Management Processes & system	Completion of transformation projects within timeline and budget	15	% Does not complete on	Within timeline & budget	complete ahead of time		%
8	IBP	T2IBP6	Ensure Risk Management & Mandatory Compliant	Mandatory and compliant rating	10	% 2	3	4		%
9	OLG	T2OLG	To strengthen Teams' capabilities & Engagement	Achievement of mandatory training	5	% Not achieving training plan	Achievement of training plan	Achieving of training plan		%
10	OLG	T2OLG	To strengthen Teams' capabilities & Engagement	Employee Engagement Index	5	% >5.5 to 6.5	>6.5 to 7.5	> 7.5 to 8.5		%
11	OLG	T2OLG	Inculcate shariah-led high performance culture	No of Successful cross selling	5	% 1	2			%
					100%					

EID : 05-081 Recommender : 26 Binil 26 Position : Training Senior Executive Recommended On :
 EID : 12-1299 Approver : 689 Bin 689 Position : Head, HR Operations Approved On :

Back Add Rows Calculate Save as Draft Print

(1) To assist you on the rating scores, please click this information button

(2) Upon completion of all scores, please click this button

(3) Finally, please click this button

Done

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Staff submits the evaluated scorecard

The screenshot shows a web browser window displaying the e-P2P application. The page title is "e-P2P :: 391 391 :: e-Appraisal - Windows Internet Explorer". The URL is "http://10.20.100.4:8080/cgi-bin/epe_scorecard.cgi". The page features a navigation menu on the left with categories like "HR Self Service", "Industry Specific", and "Company Specific". The main content area displays "Personal Information" and "e-Appraisal - My Scorecard Form".

Personal Information

EID	: 10-937	Name	: 391 391
Job Grade	: C2	Position	: Head, Retention & Rewards
Org. Unit	: Human Capital	Company	: KFHM
Sub. Unit	: Retention & Rewards	Org. Area	: Headquarters
Date Joined	: 18/11/2010	Date Left	: -
Year of Service	: 2.00 year(s)	Work Status	: Active : Permanent

e-Appraisal - My Scorecard Form

No	From	To	Phase	Status	On	By	Score	Select
1	01/01/2012	31/12/2012	Planning	Approved	05/12/2012	689 Bin 689	0.00%	<input type="radio"/>
2	01/01/2012	31/12/2012	End Result	Draft	05/12/2012	689 Bin 689	79.55%	<input type="radio"/>

At the bottom of the table, there are buttons for "Print", "Edit", and "Submit". A yellow callout box points to the "Submit" button with the text: "Please click this button for submission".

Below the table, a green-bordered box contains the text: "Once you submitted your scorecard, your supervisor will sit down with you on a one-on-one performance review session."



Staff can view the evaluated scorecard at anytime

The screenshot shows the e-P2P HR Self Service application interface. The main content area displays 'Personal Information' and 'e-Appraisal - My Scorecard Form'. The scorecard table is as follows:

No	From	To	Phase	Status	On	By	Score	Select
1	01/01/2012	31/12/2012	Planning	Approved	05/12/2012	689 Bin 689	0.00%	<input type="radio"/>
2	01/01/2012	31/12/2012	End Result	Pending	05/12/2012	689 Bin 689	79.55%	<input type="radio"/>

A yellow callout box points to the 'View' button in the 'Select' column of the second row, with the text: "Please click this button to view your submitted scorecard".



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

PERFORMANCE SCORECARD KFHM - Windows Internet Explorer

http://10.20.100.4:8080/cgi-bin/epe_scorecard_form.cgi

File Edit View Favorites Tools Help

PERFORMANCE SCORECARD KFHM

بيت التمويل الكويتي

Scorecard Form 2012 for All Employees Groups

Form ID : 1350038780 Evaluation Period : Annually

Period From : 01/01/2012 Period To : 31/12/2012 Phase : End Result Status : Pending

EID : 10-937 Owner : 391 391 Position : Head, Retention & Rewards Company : KFHM

Job Grade : C2 Org Unit : Human Capital Sub Unit : Retention & Rewards Submitted On : 06/12/2012

No.	Pers.	Ref	Performance Objectives	Measures	Weightage	Threshold	Target	Stretched	Result	Score
1	FIN	T2FIN1	To effectively manage divisional operational Cost	Operational cost within budget	10%	0 to 10% above budget	on budget	0 to 10% below budget	Result	100%
2	FIN	T2FIN1	To effectively manage divisional operational Cost	% Saving realised	5%	<10% to 5%	<-5% to 5%	>5% to 10%	Result	100%
3	CUS	T2CUS1	To ensure Customer Delight	Division ICST	15%	>5.5 to 6.5	>6.5 to 7.5	> 7.5 to 8.5	Result	100%
4	IBP	T2IBP1	To improve efficiency and effectiveness of HR Information system	% of reduction in process time from automation of key process	10%	1 to 5%	>5% to 10%	>10% to 20%	Result	50%
5	IBP	T2IBP1	To improve Performance & Rewards Management Processes & system	Policies and Processes meet business requirement	10%	Slightly not meeting requirement	Meet requirement	Better than requirement	Result	60%
6	IBP	T2IBP4	To improve efficiency and effectiveness of HR Information system	Improvement of quality and turn-around time for information, analysis and reports -scheduled reports per scheduled -adhoc report, as agreed	10%	Not meeting requirements	Consistently meeting requirement	Meeting most requirements	Result	70%
7	IBP	T2IBP1	To improve Performance & Rewards Management Processes & system	Completion of transformation projects within timeline and budget	15%	Does not complete on time and may also surpass budget	Within timeline & budget	complete ahead of time & within budget	Result	64%
8	IBP	T2IBP6	Ensure Risk Management & Mandatory Compliant	Mandatory and compliant rating	10%	2	3	4	Result	88%
9	OLG	T2OLG1	To strengthen Teams capabilities & Engagement	Achievement of mandatory training	5%	Not achieving training plan	Achievement	Achieving of	Result	90%
10	OLG	T2OLG1	To strengthen Teams capabilities & Engagement	Employee Engagement Index	5%	>5.5 to 6.5				95%
11	OLG	T2OLG2	Inculcate shariah-led high performance culture	No of Successful cross selling	5%	1				78%
					100%					79.55%

EID : 05-081 Recommender : 26 Binbi 26 Position : Training Senior Executive Recommended On : ...

EID : 12-1298 Approver : 689 Bin 689 Position : Head, HR Operations Approved On : ...

Back Print

Please click this button to print your scorecard for your one-to-one performance review session with your immediate superior



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

The screenshot shows the 'e-P2P Applications HR Self Service' interface. The main content area displays 'Personal Information' for user 391 391, including details like Job Grade (C2), Org. Unit (Human Capital), and Date Joined (18/11/2010). Below this is a table titled 'e-Appraisal - Annual Performance Appraisal' with the following data:

From	To	Overall Score	Overall Rating	Form	Select
01/01/2012	31/12/2012			View Form	<input type="radio"/>
01/01/2011	31/12/2011	-	4		<input type="radio"/>

A yellow callout box points to the 'View Form' link in the first row, containing the text: 'Please click this button to fill out'. The 'Edit' button in the bottom right corner is highlighted with a red box.



Staff fills out the Endorsement & Comments

The screenshot shows a web browser window displaying the e-P2P HR Self Service application. The page title is "e-P2P Applications HR Self Service" and the user is identified as an "expert user::". The interface includes a navigation menu on the left with categories like HR Self Service, Industry Specific, and Company Specific. The main content area displays "Personal Information" and "e-Appraisal - Annual Performance Appraisal" for the period 01/01/2012 to 31/12/2012. Two sections are listed: "1. Training, Development & Growth" and "2. Endorsements & Comments". A red box highlights a "Go" button next to the second section, with a yellow callout box pointing to it that says "Please click this button".

Personal Information

EID	: 10-937	Name	: 391 391
Job Grade	: C2	Position	: Head, Retention & Rewards
Org. Unit	: Human Capital	Company	: KFHM
Sub. Unit	: Retention & Rewards	Org. Area	: Headquarters
Date Joined	: 18/11/2010	Date Left	: -
Year of Service	: 2.00 year(s)	Work Status	: Active : Permanent

e-Appraisal - Annual Performance Appraisal

Performance Period : 01/01/2012 to 31/12/2012

1. Training, Development & Growth
2. Endorsements & Comments

Please click this button



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

HR Self Service

- e-Claims
- e-Data
- e-Financial
- e-Forms
- e-Leave
- e-Policy
- e-Posting
- e-Time
- e-Training

Industry Specific

- e-Development
- e-Loan
- e-IR

Company Specific

- e-Appraisal
- e-Flex Benefits

User Profile:
10-937

Personal Information

EID	: 10-937	Name	: 391 391
Job Grade	: C2	Position	: Head, Retention & Rewards
Org. Unit	: Human Capital	Company	: KFHMB
Sub. Unit	: Retention & Rewards	Org. Area	: Headquarters
Date Joined	: 18/11/2010	Date Left	: -
Year of Service	: 2.00 year(s)	Work Status	: Active : Permanent

e-Appraisal - Endorsements & Comments

Employee's Endorsement

I agree with the evaluation I disagree with the evaluation

Employee's Comments & Feedback

Employee Comments & Feedback for his/her appraisal form

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

Discussion on: 06/12/2012 Acknowledged by Employee on : 06/12/2012

Back **Preview**

Please click this button



Staff submits his / her comments

The screenshot shows a web browser window displaying the e-P2P HR Self Service application. The page title is "e-P2P Applications HR Self Service" and the user is identified as "expert user::". The interface includes a navigation menu on the left with categories like HR Self Service, Industry Specific, and Company Specific. The main content area is titled "e-Appraisal - Endorsements & Comments" and contains the following sections:

- Personal Information:** A table with fields for EID, Job Grade, Org. Unit, Sub. Unit, Date Joined, Year of Service, Name, Position, Company, Org. Area, Date Left, and Work Status.
- Employee's Endorsement:** Radio buttons for "I agree with the evaluation" (selected) and "I disagree with the evaluation".
- Employee's Comments & Feedback:** A text area for "Employee Comments & Feedback for his/her appraisal form".
- Discussion on:** 06/12/2012
- Acknowledged by Employee on:** 06/12/2012

At the bottom right of the form, there are "Back" and "Submit" buttons. A yellow callout bubble with the text "Please click this button" points to the "Submit" button, which is also highlighted with a red rectangular box.



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

- 1) Tan Siew Keng**
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Thank you