Please think before printing this document.

Where printing is necessary, please ensure that it is printed double sided and in greyscale.
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1 Introduction

This document is a guide to using the MyView Dashboard Performance Appraisal Module.

The Performance Appraisal scheme requires line managers (appraisers) to meet with their employees (appraisees) on an annual basis to review and plan in relation to their duties. In addition, each employee should be having regular supervision/one to one/team job chats with their manager, which will help them to perform.

The below list form the key elements of the process:

- discuss job performance
- set specific objectives and targets in line with the Council's vision and the priorities to be achieved over the coming year
- assess current training and development needs
- discuss support required from the manager
- discuss the achievement of objectives, targets and key performance indicators as well as competency development

Appraisal Performance Guidance Notes are also available which outline the entire scheme and details the relevant forms and supporting documentation as well as a brief appraisee guide that explains the preparation required before attending an appraisal meeting.

The scheme also incorporates a Performance Appraisal Probation Form which must be completed during a new employee's probationary period and it is important that managers plan the performance appraisal probation meetings and record the outcomes. In addition, there is also a Performance Appraisal Induction form for employees who are new in post, which focuses on the council's competency framework, values and incorporates objective and target setting for the forthcoming 12 months. This process is supported by 1-2-1/Supervision meetings and team job chats.

Further guidance on the corporate Performance Appraisal scheme can be located via the intranet or alternatively you should contact the HR Advice & Support Team via email: HRAdviceandSupport@durham.gov.uk.

Supervision requirements within Adult and Health Services and Children and Young People’s Services go beyond the corporate Performance Appraisal framework. Employees are required to undertake additional supervisions/reviews on a regular basis. Please contact your Service Representative for further details.

This guidance does not cover the mechanics of the performance appraisal process but will inform an employee how to view appraisal history via MyView Dashboard and inform managers how they can record an appraisal event as well as uploading completed appraisal documentation.

1.1 What is MyView Dashboard?

MyView Dashboard is a web based self-service system that allows employees and managers to view and edit their own personal details online.
MyView Dashboard supports the Council’s objective of making processes more efficient and streamlined.

Revised user guidance documentation to support the use of MyView Dashboard and Frequently Asked Questions are available via www.durham.gov.uk/MyView.

Providing access to MyView Dashboard via the internet will give you 24/7 access allowing you to:

- View and update personal information, including name, address and emergency contact information.
- View, download and print payslips and P60 statements.
- Submit mileage and expenses claims as well as uploading receipts.
- Employees will be able to submit training requests for managers to authorise.
- Managers will be able to view expense submissions, authorise, and reject claims if required.

1.2 What is new about MyView Dashboard?
As well as providing access over the internet, MyView Dashboard has an enhanced look and feel and is much more intuitive to use. MyView Dashboard has a number of features and benefits including:

- Enhanced navigation, usability and appearance – MyView Dashboard can be accessed using smart devices mobile phones and tablets
- Customisable widgets that provide quick access to information
- Appearance and functionality has been improved
- The ability to view authorisation progress across all MyView Dashboard forms
- Removal of Payslip and P60 printing and postage costs by enabling access to e-Payslips and P60's.

1.3 What is the MyView Dashboard Performance Appraisal Module?
The Appraisals module enables employees to view their appraisal history online, and enables managers to view an employee’s appraisal history, amend open appraisals and add new appraisals.

There are two distinct groups of users that can access MyView Dashboard; employees and managers.
When you access the Appraisals module, your appraisal history is listed with a summary of the appraisal date, type and status. You can view details for an appraisal by clicking on the form number provided the appraisal was created in MyView Dashboard.

**When a manager accesses the Appraisal module on behalf of an employee, the same appraisals are listed but the manager can also create a new appraisal.**

The use of MyView Dashboard to record an appraisal event will reduce administrative time for managers and HR/Payroll as well as provide managers/employees with easy access to appraisal history.

Managers (appraisers) will be able to ensure that appraisal events are recorded as soon as they have been completed. Whilst it can take time for appraisal documentation to be completed, a manager can ensure that a record of the event is recorded in real time. The module and associated MyView Alerts also act as a reminder to managers to undertake an appraisal event.

From a HR perspective, it ensures that all appraisals are recorded accurately and on time providing a true reflection of current performance. This will also ensure that effective monitoring of the existing Performance Appraisal scheme can take place.

### 1.4 Further information

If you would like any further advice or would like the document in an alternative format, please contact the MyView Team within HR Operations and Data using the contact details below:

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Please ask us if you would like this document summarised in another language or format.
2 Employee – Viewing Appraisal Events

- Click on the [Employee Appraisals] link on the left hand navigation panel.

You will be presented with a list of all the appraisal events that have been recorded for you within the system. This record will show the date, appraisal event type and event status.

Completed appraisal documentation cannot be attached directly to the appraisal event recorded in this module. The appraiser is responsible for recording all of the appraisal discussions on the appropriate performance appraisal documentation. Completed appraisal documentation should be uploaded against employee records (see s6).

A copy of the completed performance appraisal documentation should always be given to the appraisee and the originals should be retained by the appraiser and stored securely as a confidential document.

If you consider that an appraisal event has not been recorded or has been incorrectly recorded, please alert your manager in the first instance.

Managers can record new appraisal events (see s3) but cannot edit an existing appraisal event. If a recorded event needs to be amended or deleted, managers should contact HR Operations & Data via MyView@durham.gov.uk to action.
3 Manager – Recording an Appraisal Event

- Within MyPeople, click [Select] against the relevant employee
- Click [Employee Appraisals] from the left hand navigation panel

This will bring up the Employee Appraisal Form History for the selected employee.

Managers will be able to view full employee appraisal dates/event history but can only record appraisal events that are dated after their own post start date.

- Click [Create] to display the Appraisal Details form. If the employee has more than one post, select the appropriate [Post] and select the appraisal [Type]. Click [Next].
• Record the [Completion Date] and amend the [Status] to “Completed”. Click [Submit].

The Confirmation message is displayed before returning to the Appraisal module page, where the appraisal is displayed in the Appraisal History section with an appropriate status.
4 Appraisal event types

The following appraisal events can be recorded within MyView Dashboard:

**Annual**
Completed every 12 months, the Annual Performance Appraisal is an opportunity for an open and honest discussion between the appraiser and appraisee to reflect on the last 12 months and to consider the competency framework, whilst agreeing objectives and development needs for the coming year.

**Group Appraisal**
Some employees are not always based on site and it is difficult to provide opportunities to complete individual appraisals. In this instance, a group appraisal can be held to review progress.

**Group Supervision**
Some employees are not always based on site and it is difficult to provide opportunities for a regular 1:1 supervision/review. In this instance, a group supervision can be held to review team/group priorities and progress.

**Induction Appraisal**
Within 4 weeks of starting employment with Durham County Council, all new employees (or those employees who have moved between or within Services) must meet with their new manager to undertake a performance appraisal induction. This involves identifying objectives/targets and any training and development needs required, as well as providing an introduction to the competency framework.

**Team Job Chat**
It is important for managers to conduct one to one / supervision meetings or team job chats to support the performance appraisal process in order to provide feedback to employees, review performance and receive feedback on an individual or team basis.

**Observation**
Direct Observation is an observation of the employee’s direct practice within their work and possibly with service users. Their performance is observed against the competencies set out in the Common Core of Skills and Knowledge. It is not a mandatory part of the framework and is at the discretion of the Head of Service and/or Manager to implement this.

**One to One**
Supervision/Review (otherwise known as one to one) meetings represent the formal process whereby employees demonstrate accountability for their work and each individual employee receives the support that they require to carry out their work to the best of their abilities.

**Prob 3 Month (Probationary 3 month)**
As most new employee will be subject to a probationary period, managers must plan and record their 3 and/or 6 month Performance Appraisal Probationary meetings. The purpose of these meetings is to review the employees progress in the role against the objectives/targets set during the performance appraisal induction meeting, review the demonstration of the competencies and discuss any training and development needs. Finally, the appraiser indicates whether the
appraisee has successfully achieved the accepted level of performance required during the probationary period.

**Prob 6 Month (Probationary 6 month)**
Employees should not be taken forward to a 9 month review without the involvement of Human Resources.
5 Delegated Input of Appraisal Events

The ability to submit on behalf of another person is pre-determined within ResourceLink. Individual posts will have delegated responsibility to input claims on MyView on behalf of another employee. Should you have any queries on delegated duties please email MyView@durham.gov.uk.

If you have been set up to input appraisal events on behalf of another employee, click on the [Delegated Duties] link on the left hand navigation panel.

- Under [Responsibilities] you will see a list of the delegations available to you. Please select the appropriate responsibility.
- Select the appropriate employee from the delegation rule (you may have delegated access for more than one employee within the same delegation rule) by clicking on the relevant employee name.

It is important to highlight that once you have selected the appropriate person from the above list, there is no further reference to the person you have just selected.

- Click [Create]. You will then follow the same instructions described in s3.
6 Manager - Uploading Completed Appraisal Documentation

Managers can securely store an electronic copy of appraisal documentation against an employee’s record. All completed performance appraisal documentation covered by the corporate scheme should be stored using this facility. Managers are still required to continue to record dates of appraisal events via the Appraisal Module.

Appraisal documents should be signed by the appraisee and the endorsing officer before it is scanned and uploaded to MyView Dashboard. Once document is uploaded, both employee and manager will be able to view the appraisal documentation.

Managers should upload completed Induction Checklist and any other induction related documentation against an employee’s record using this facility.

6.1 Scanning Appraisal Documentation

Once the appraisal document has been completed and signed by the appraisee and endorsing officer, it will need to scanned so that an electronic copy can be uploaded to MyView Dashboard. Managers are advised to ‘scan to email’ so that the scanned document can be accessed securely.

1. Place the document in the MFD feeder tray
2. Select the ‘e-mail’ option on the MFD screen display
3. Set up the required scan options (colour, single or 2 sided document, file name)

Full guidance on using the Xerox Multi-Functional Devices can be found on the Intranet. Alternatively please contact the ICT helpdesk on 03000 261 100.

4. Once the document has been scanned, you will receive an email containing the scanned document

5. You should save the email attachment to a secure network folder (e.g. ‘My Documents’).
6.2 File Name

Managers are advised to ensure that scanned appraisal documents are given an appropriate name before they are uploaded to MyView Dashboard. This will ensure that individual documents can be easily identified.

The preferred naming convention is:

Employee Number, Appraisal Type, Appraisal Date

For example: 123456 - Annual Appraisal - 010917

6.3 Uploading Scanned Appraisal Document

- Within the MyPeople Team Selector, click [Select] against the relevant employee.
- Click [Employee Electronic Documents] from the left hand navigation panel
- Click [Appraisal Documentation] from the drop down list.
This will bring up all of the appraisal documentation stored against the selected employee.

- **Click [Upload a new document]** from the left hand navigation panel.

  ![Upload a new document](image1)

- **Click [Choose File]** to locate the scanned appraisal document.

  ![Choose File](image2)

- **Select the correct [Category]**. Managers can upload documents against four different categories:
  - Appraisals
  - Induction Checklist
  - Supervision Documentation
  - Induction Documentation

- **If you are sure you have selected the correct document and chosen the correct category, you should click [Submit]**. Once the document has been submitted, it will appear in the Appraisal Documentation view under the relevant document category.

Once a document is uploaded, managers will not be able to delete documents. Should a manager require that an uploaded document be deleted please email MyView@durham.gov.uk.
7 Employee Viewing Completed Appraisal Documentation

- Click on the [Electronic Documentation] link on the left hand navigation panel.

- Click [Appraisal Documentation] from the drop down list.

- Select the appropriate document. To view the document click [Download this document].

Employees can not edit these documents. Should there be a query over the content of the completed appraisal document please contact the appraiser (manager) in the first instance.