MID YEAR REVIEW

The ‘Performance Review’ Quick Reference Guide helps you navigate through the Performance module of the HRIS system. This guide can be used by both the line manager and employee to navigate the HRIS system through the Mid year review process.

WHAT IS THE PPDR PROCESS?

The Personal Performance Development & Review (PPDR) process is a cyclic process which develops and forms the basis for a two way communication where managers can recognise employee contributions and enable employees to plan their own learning and development in their current jobs. A formal interim review is held at the Mid Year. This ensures the individual has the opportunity to sit down face-to-face with their line manager to discuss progress against their objectives, and to raise any difficulties they may be encountering. It also assists them in developing their future career plans.

The line manager and employee agree on updating, adding or cancelling objectives for completion over the next 6 months, and where necessary, identify any training and development needs. The benefit of a mid year review is that it provides the opportunity to determine how well employees are meeting expectations and objectives, to provide them with early feedback, and to modify any objectives which appear unrealistic or problematic.

The manager schedules time with the employee to discuss the performance for the mid year assessment. This is essential in order for both the employee and the manager to understand the progress of an employee in the organisation and address any gaps in performance effectively. Manager collates feedback from all relevant stakeholders including the dotted line manager for whom the employee has worked with for the performance year for an effective discussion.

NAVIGATING THROUGH TO MID YEAR REVIEW FORM

1. Once the discussion is complete the employee enters the data in the form by clicking on the link of the form (on the performance review module) to begin working on the review (Mid Year or Year end review form.)

2. Mid year for the performance year can be accessed either through
   a. The ‘Mid Year Reviews’ hyperlink under the ‘To Do’ section on the home page
   b. The ‘Performance Review’ section from the ‘Home’ drop down option.
3. On entering the ‘Performance Review’ module, you are taken to the ‘My Forms’ section.

4. The My Forms section shows all PPDR forms that need to be actioned by, either as an employee or a manager.

5. Click on your PPDR form under the step ‘Mid Year Reviews’ to review and edit agreed objectives, add behaviours as well as document progress for the performance year.

HOW TO RECORD A MID YEAR REVIEW?

1. The employee captures progress against each for the performance year. This is over

2. Employee would also need to update progress against each behavioural objective that was set at the beginning of the year.
3. Employee captures an overall assessment for ‘Mid Year’ review

4. The employee also tracks progress on the individual development plan for the year and send the form to the manager for review and assessment.

5. Once the employee completes the update the form is sent to the manager for review and sign off.

6. Managers can add comments for each of the objectives and behaviours for the employee; as well as adds overall comments for each of the review period.

7. The manager can also adds comments against the development plan before signing off the review process.

8. The manager then selects the ‘Sign off Mid Year Review’ to move the form to the next stage of the process. The form moves into the Year end review stage when the Mid Year process is signed off.

Note: It is imperative that managers schedule the in-person discussion with the employee. Do NOT use the tool as a method to skip this very important part of the review process. Once the form moves from the year end review to the manager review, you will not be able to set new objectives for the performance year.