

# GroSum

## Quick Guide

## **Self Appraisal**

1. Employee logs into PMS & goes to dashboard

## Sign In

Admin

.....

Where do you want to start from today?

My Tasks

? [Forgot Password](#)

Login



Login into PMS

Go to Dashboard

Review 2017

Change Review Cycle

Dashboard

My Tasks

All Reviews

My Reports

Home

Hanna

Review for the period: 25 Jul 2017 - 24 Jul 2018

Links

Goals

My Manager has signed off my goals

View my finalized goals

Appraisal (Due by 31 Jan 2018)

My Review

I need to do my Self Review

Go

My Manager is awaiting my signoff

I need to accept & signoff after Manager sign off

Done

2. Under Appraisal, Employee sees a red link – I need to do Self Review – GO
3. Employee clicks the link to start self review

Review 2017 ▾ Hanna ▾

## Dashboard

Review for the period: 25 Jul 2017 - 24 Jul 2018

### Goal Settings (Due by 31 Aug 2017)

My Goals

My Manager has signed off my goals

[View](#) my finalized goals

### Appraisal (Due by 31 Jan 2018)

My Review

I need to do my Self Review [Go](#)

My Manager is awaiting my signoff

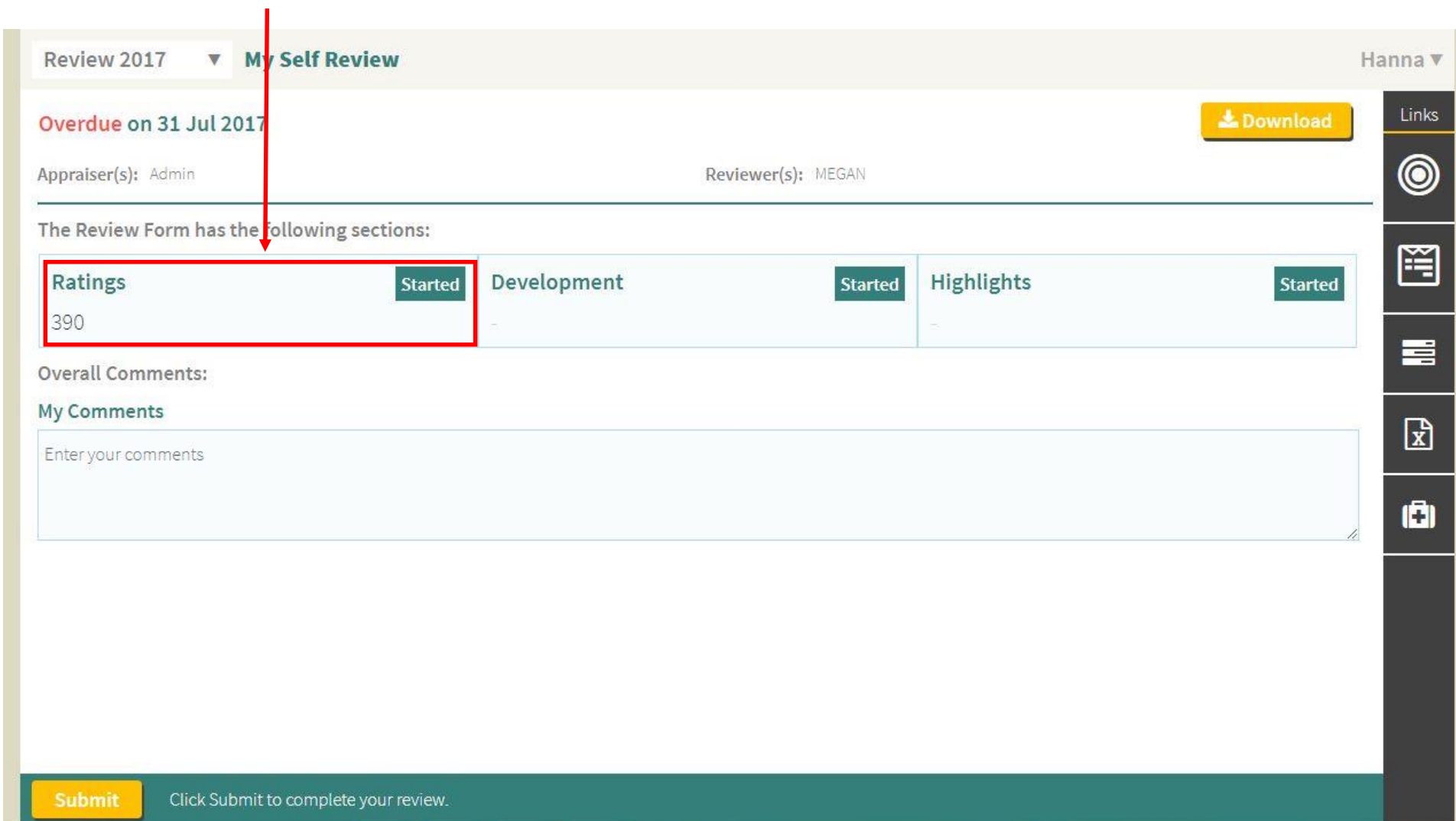
I need to accept & signoff after Manager sign off

Done

Click link to start  
self review

4. In the Appraisal screen, the employee can see all the forms that he has to provide inputs on – Ratings, Development etc.
5. The Employee clicks on Ratings to provide ratings to objectives & competencies.

Click on Ratings



Review 2017 ▼ **My Self Review** Hanna ▼

**Overdue on 31 Jul 2017** [Download](#)

Appraiser(s): Admin Reviewer(s): MEGAN

The Review Form has the following sections:

<b>Ratings</b> 390	<b>Development</b>	<b>Highlights</b>
Started	Started	Started

Overall Comments:

**My Comments**

Enter your comments

[Submit](#) Click Submit to complete your review.

6. In the Ratings section, the employee can see the list of objectives. Against each subjective objective, there is a rating scale provided to give rating. The employee clicks on a rating from the scale to give rating. He clicks on SAVE – the screen refreshes and the employee can see the rating is given.
7. For measurable goals, the employee can update the actual performance against the set target. Based on the actuals, the system automatically determines a rating.
8. If the employee wants to add comments, he can click on ADD COMMENTS

Click on Add  
Comments

Click on Rating Scale to  
give rating

The screenshot displays the 'My Self Review' interface for the year 2017. The 'Ratings' section is active, showing a list of objectives. The interface includes a navigation bar with tabs for 'Development', 'Highlights', 'Submit', and 'Links'. The 'Objectives' tab is selected, showing a list of objectives with their respective targets and actuals. The 'Add Comments' button is highlighted for the 'New Objective' entry. The rating scale for the 'New Customer Accounts' entry is also highlighted, showing a rating of 3.

Objective	Target	Actual	Rating
Customer Service	10.0%	400.00	
New Objective	10.0%		4
Financial Targets	10.0%	300.00	
New Customer Accounts	10.0%	25.0	3
Group Synergy	30.0%	400.00	
SPECIAL GOAL	30.0%		4
Risk & Control	50.0%	400.00	

Save Remember to SAVE if you have made any changes Rating: Overall: 390.00

9. In the ADD COMMENTS, the employee can add comments, accomplishments etc & click on SAVE. The details are successfully saved.
10. Next, the employee can provide inputs on the development & the other sections.

Click on development  
& the other sections

Review 2017 ▾ Hanna ▾

**Ratings** 1 Development 2 Highlights 3 Submit 4

◀ Show All **Objectives** - Competencies

New Objective 10% ▾

Description:  
Test4

Due Date:  
43101

Rating: 4 - High Contributor

4

Comments Accomplishment Attachments

Your Comment

Save Remember to SAVE if you have made any changes

Prev Goal Next Goal  
New Customer Accounts

Click on Save

Add your  
comments

Enter your inputs

Review 2017

My Self Review

Hanna

Home

Ratings

1 Development

2 Highlights

3 Submit

4

Professional Development

Add

Area :

Enter aspect of professional development

Timeline :

Specify how soon this development needs to be addressed

Plan :

State how this development need can be addressed

Linked Goal:

Choose Goal

Training Needs

Add

Program Name :

Save

Remember to SAVE if you have made any changes



11. Finally, once self-appraisal is completed, the employee can enter final comments and submit the appraisal. No further changes can be done by the employee.

Enter your  
comments

Review 2017

My Self Review

Hanna

Overdue on 31 Jul 2017

Download

Appraiser(s): Admin

Reviewer(s): MEGAN

The Review Form has the following sections:

Ratings	Started	Development	Started	Highlights	Started
390					

Overall Comments:

My Comments

Enter your comments

Submit

Click Submit to complete your review.

Click on Submit

12. Email alert is sent to Appraiser that employee has submitted the self-appraisal and now, Appraiser can start the appraisal.

Review 2017 ▼

My Self Review

Hanna ▼

Overdue on 31 Jul 2017

Download

Appraiser(s): Admin

Reviewer(s): MEGAN

The Review Form has the following sections:

<div>Ratings</div> <div>390</div>	<div>Development</div> <div>-</div>	<div>Highlights</div> <div>-</div>
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Overall Comments:

My Comments

N.A.

The review is completed

# GroSum

You are an Expert Now

