

Western Cape Government



BETTER TOGETHER.

PERMIS

User Manual

Mid-year Review (Level 1 to 12)

Compiled by:

- Directorate: Service Benefits and
- Directorate Economic Governance and Administration

CORPORATE SERVICES CENTRE

DEPARTMENT OF THE PREMIER

Version 4

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1. Capture mid-year Review Employee

Select My Review

After one have signed in to the PERMIS the dashboard will be your landing page. When on the dashboard page select “My Review” on the left-hand side Menu bar, to capture your review.

The screenshot shows the PERMIS dashboard for Emmanuel Blaise (00000005). The dashboard includes a navigation menu on the left, a top navigation bar, and a main content area. A blue circle with the number 1 highlights the 'My Reviews' menu item. The main content area displays performance metrics for three cycles and a table of performance agreement history.

Cycle	Mid year review	Annual assessment
2016/2017	0%	0%
2017/2018	0%	0%
2018/2019	100%	0%

Cycle	Dept	Component	Level	Job Title	Created on
2018/2019	DotP	ECONOMIC/GOVERNANCE & ADMINISTRATION	12	DIRECTOR	2018-06-27
2018/2019	DotP	ECONOMIC/GOVERNANCE & ADMINISTRATION	12	DIRECTOR	2018-03-26
2018/2019	DotP	ECONOMIC/GOVERNANCE & ADMINISTRATION	12	DIRECTOR	2018-02-25
2017/2018	DotP	ECONOMIC/GOVERNANCE & ADMINISTRATION	12	DIRECTOR	2017-12-07
2016/2017	DotP	ECONOMIC/GOVERNANCE & ADMINISTRATION	12	DIRECTOR	2016-10-20
2015/2016	DotP	ECONOMIC/GOVERNANCE & ADMINISTRATION	12	DIRECTOR	2015-04-20
2014/2015	DotP	ECONOMIC/GOVERNANCE & ADMINISTRATION	12	DIRECTOR	2014-05-10
2013/2014	DotP	ECONOMIC/GOVERNANCE & ADMINISTRATION	12	DIRECTOR	2013-05-15
2012/2013	DotP	ECONOMIC/GOVERNANCE & ADMINISTRATION	12	DIRECTOR: CLUSTER GITO	2012-05-03

1.1. Select mid-year Review

After one have selected the **My Review** tab the below screen will display. On this screen one must ensure that you select the following;

1. The *current financial year* to ensure you work on the right review
2. Select the correct *Review Type*, should always be “Performance Review”
3. Select the correct *Review Period* “**Mid-year Review** will be (April – September) and the **Annual Assessment** will be (April - March).
4. After the above mentioned have been selected, **Capture the weight** for all KRA’s
5. Then, ensure that you **Save Weight**

The screenshot shows the 'Performance Review' interface. The left sidebar contains a 'STAFF MENU' with 'My Reviews' highlighted. The main header shows 'Performance Review' and 'The mid-year review is open for the capturing of scores by employee and supervisor.' Below this, there are three dropdown menus: '2018/2019' (callout 1), 'PERFORMANCE REVIEW' (callout 2), and 'MID YEAR REVIEW (01 APR 2018 - 30 SEP 2018)' (callout 3). The 'KEY RESULTS AREA TOTAL' section includes a 'SAVE WEIGHT' button (callout 5). The 'PERFORMANCE AGREEMENT' table is as follows:

Weight	Key Result Area	Weight	Agreed Rating	Score %
30	1. KRA	<input type="text" value="0"/>	0.00	0.00
30	2. KRA	<input type="text" value="0"/>	0.00	0.00
30	3. KRA	<input type="text" value="0"/>	0.00	0.00
10	KRA4	<input type="text" value="0"/>	0.00	0.00
		0%		0%

At the bottom, there are input fields for 'KRA RATING' (0.00) and 'KRA SCORE' (0%). On the right, there are 'Signoffs' and 'Support' sections. Callout 4 points to the 'Agreed Rating' column in the table.

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1.2. Key Result Area weight (KRA) weights

After one have saved the weights of all KRA's as per above instructions. One must;

1. Select each **KRA** (click on the KRA)
2. Then one must select the **Key output** of that

The screenshot displays the PERMIS 4.18.09.13 interface. The left sidebar contains a menu with options like 'My Profile', 'Dashboard', 'Agreement', 'My Reviews', 'Employees', 'Manage Users', 'Manage Authoc', 'Manage Dates', 'Manage Issues', 'Permis Manager', 'System Reports', and 'Logout'. The main content area is titled 'REVIEW KRAS FINAL SCORE TRAINING'. It features two tables: 'PERFORMANCE AGREEMENT' and 'PERFORMANCE REVIEW'. The 'PERFORMANCE AGREEMENT' table lists three KRAs with weights of 30, 30, and 10. The 'PERFORMANCE REVIEW' table shows the agreed ratings and scores for these KRAs. A 'KRA RATING' section shows a score of 0.00 and a 'KRA SCORE' section shows 0%. Below this, a '2. KRA' section is visible, containing a 'PERFORMANCE AGREEMENT' table with a 'Key Output' 'DEMO4' and a 'SELECTED REVIEW RATINGS' table. A 'GENERIC ASSESSMENT FACTORS (GAFs)' section is also present, showing 'Not Applicable'. On the right side, there is a 'Progress' section with a closing date of 30-09-2018 and a date/time left of 02 weeks and 03 days - 14:32:54. Two blue callout boxes with numbers 1 and 2 point to the '1. KRA' and 'DEMO4' rows respectively.

Weight	Key Result Area	Weight	Agreed Rating	Score %
30	1. KRA	30	0.00	0.00
30	2. KRA	30	0.00	0.00
30	3. KRA	30	0.00	0.00
10	KRA4	10	0.00	0.00
		100%		0%

Weight	Key Output	Weight	Staff	Super	Agreed	Score
100	DEMO4	0	0	0	0	
100%		0%				0.00

**Please note these steps are relevant for all KRA's to be able to capture key output scores.*

1.3. Key Output Weight and Self Rating

After one have selected the **Key Output** below screen will display. On this screen one must do the following;

1. Capture your output **Weight**, please note that the weight will display as per the Performance Agreement, but one can change the weight if needed.
2. Capture your **Rating** (the rating should be 1-4, it can only be whole numbers)
3. Capture the **Employee Progress/Actions**
4. Capture **Employee Barriers**
5. Select **Save** to save information captured

PERMIS 4.18.09.13
Emmanuel Blaise (00000006)

REVIEW KRAS FINAL SCORE

PERFORMANCE AGREEMENT

Weight	Key Result Area
30	1. KRA
30	2. KRA
30	3. KRA
10	KRA4

KRA RATING
0.00

1. KRA

PERFORMANCE AGREEMENT

Weight	Key Output
100	demo
100%	

GENERIC ASSESSMENT FACTOR

Acceptance of responsibility

Output Weight (%) Employee rating Supervisor rating Agreed rating Score

100 x 0 0 0 0.00

Employee Progress/Action

Employee Barriers

Supervisor Comments

CLOSE SAVE

**Please note these steps must be followed for all key outputs that must be captured*

1.4. Capture training needs

After capturing your key outputs Training is the next area to complete.

1. Select the **Training Tab** (below screen will display)
2. **Select the KRA** for which you require training
3. After you have selected a KRA, click on the + /ADD button to open training capture screen
4. After you have select all your training you must check the box “**I HAVE CAPTURED MY TRAINING NEEDS INLINE WITH MY PERSONAL DEVELOPMENT PLAN**”

PERMIS 4.18.09.13
Emmanuel Blaise (50000006)

STAFF MENU
My Profile
Dashboard
Agreement
My Reviews
Employees

ADMIN MENU
Manage Users
Manage Adhoc
Manage Dates
Manage Issues
Permis Manager
System Reports
Logout

The mid-year review is open for the capturing of scores by both the employee and supervisor.

2018/2019 PERFORMANCE REVIEW MID YEAR REVIEW (01 APR 2018 - 30 SEP 2018)

REVIEW KRAS FINAL SCORE TRAINING

CAPTURE TRAINING NEEDS

ADD DELETE

SELECT KEY RESULT AREA
1. KRA

Courses	Provider	Category	Time Frame
<input type="checkbox"/> Salary Administration	Internally Provided Transversal	PERSAL	Daily
<input type="checkbox"/> Service Termination	Internally Provided Transversal	PERSAL	Daily

CONFIRM TRAINING REQUIREMENT

I HAVE CAPTURED MY TRAINING NEEDS INLINE WITH MY PERSONAL DEVELOPMENT PLAN

Employee signoff
Pending signoff
Supervisor Signoff
Pending signoff

Support
Automated user guide

Due Date
Closing date
09-2018
3 days left
and 03 days -

Overall rating
65.4%

KRA progress
100.0%

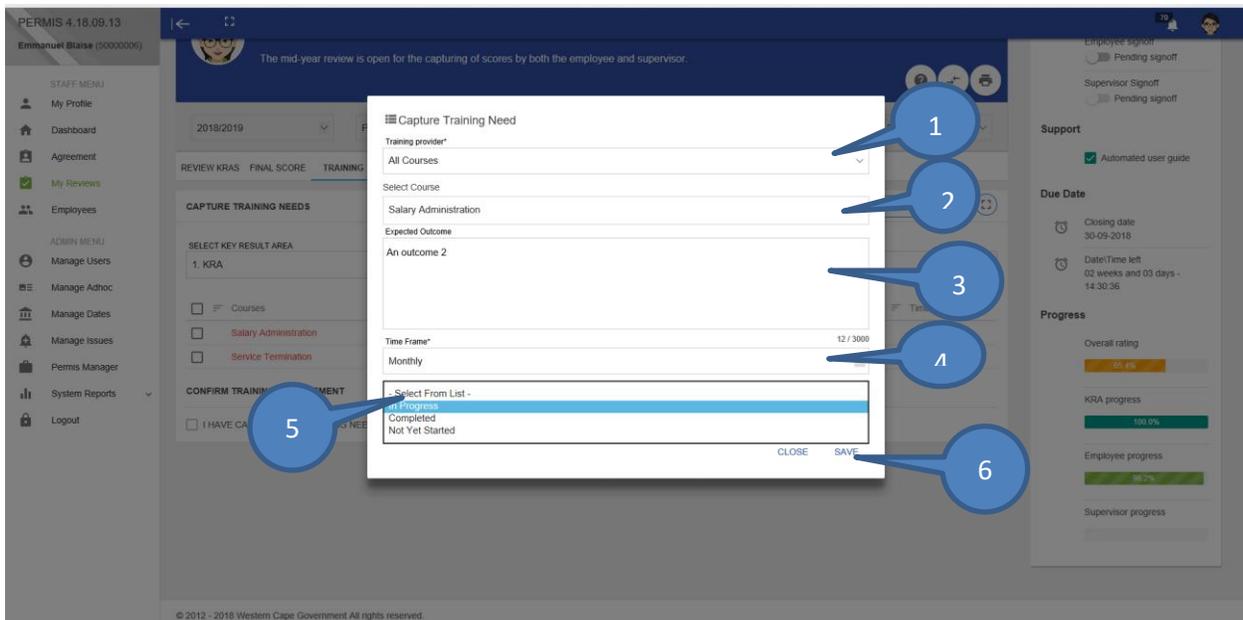
Employee progress
99.2%

Supervisor progress

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This screen will display after you have selected the +/ADD button to add additional training as required. The following must be captured on this screen;

1. Select the **Training Provider** (Transversal training, departmental training and additional training)
2. Select the **Course** you would like to attend
3. Capture the **Expected Outcome** of the course
4. Capture the **Timeframes** of the training
5. Note: The default status of all training will be New, if you have existing trainings you must indicate the status of the training, indicate if the training is: In Progress, Completed or not yet started. If not yet started you must provide reason.
6. Once you have captured all the above you can click on the **Save button**, to save the information.



After you have capture all your training;

1. You must check the box “I HAVE CAPTURED MY TRAINING NEEDS INLINE WITH MY PERSONAL DEVELOPMENT PLAN”

PERMIS 4.18.09.13
Emmanuel Blaise (00000006)

STAFF MENU
My Profile
Dashboard
Agreement
My Reviews
Employees

ADMIN MENU
Manage Users
Manage Adhoc
Manage Dates
Manage Issues
Permis Manager
System Reports
Logout

2018/2019 PERFORMANCE REVIEW MID YEAR REVIEW (01 APR 2018 - 30 SEP 2018)

REVIEW KRAS FINAL SCORE TRAINING

CAPTURE TRAINING NEEDS

SELECT KEY RESULT AREA
1. KRA

Courses	Provider	Category	Time Frame	
<input type="checkbox"/>	Salary Administration	Internally Provided Transversal	PERSAL	Monthly
<input type="checkbox"/>	Service Termination	Internally Provided Transversal	PERSAL	Daily

CONFIRM TRAINING REQUIREMENT

I HAVE CAPTURED MY TRAINING NEEDS INLINE WITH MY PERSONAL DEVELOPMENT PLAN

Support
Automated user guide

Due Date
Closing date: 30-09-2018
Date/Time left: 02 weeks and 03 days - 14:29:58

Progress
Overall rating: 100.0%
KRA progress: 100.0%
Employee progress: 100.0%
Supervisor progress: 100.0%

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Once the training sections have been completed your supervisor must review your performance and rate you. Thereafter you and your supervisor must have a one-on-one session in which you agree on an Agreed Score for your review.

2. Capture Mid-Year Review (Supervisor)

Each employee has a supervisor assigned whom is responsible to review performance. On the supervisor side the supervisor has the **Employee tab** whereby he/she have access to all his/her subordinates. To review your subordinate(s), you must do the following;

1. Select the **Employee tab** on the left-hand side
2. Select the **relevant year** of review
3. Select the **Performance Review**

The screenshot displays the PERMIS 4.18.09.13 web application. The left-hand navigation menu is visible, with the 'Employees' link highlighted by a blue callout box labeled '1'. The main content area shows the 'My staff members' page for the year 2018/2019. A blue callout box labeled '2' points to the year selector. Below the year selector, there are two tabs: 'PERFORMANCE AGREEMENT' and 'PERFORMANCE REVIEW'. The 'PERFORMANCE REVIEW' tab is selected, and a blue callout box labeled '3' points to it. The main content area displays a table of direct subordinates for the selected year and tab. The table has columns for 'Persal no.', 'Surname / Full Names', 'Job Title', 'Level', 'Staff Sign Off', and 'Super. Sign Off'. A single entry is shown for 'Nkosi, Emmanuel Blaise', Director, Level 12, with sign-off dates of 2018-09-13. The table is paginated to show 1 of 1 entries.

PERFORMANCE AGREEMENT	PERFORMANCE REVIEW				
STAFF CAPTURE	TRANSFER AGREEMENT	STAFF REPORT			
PERFORMANCE AGREEMENT FOR 2018 CYCLE					
DIRECT SUBORDINATES					
Showing 10 entries					
Persal no.	Surname / Full Names	Job Title	Level	Staff Sign Off	Super. Sign Off
50000006	Nkosi, Emmanuel Blaise	Director	12	2018-09-13	2018-09-13
Showing 1 to 1 of 1 entries					

The following screen will display after you have selected the Performance Review. On this screen the supervisor need to;

1. Select the correct Review Period
2. Select the Employee which you want to review

PERMIS 4.18.09.13
Heraldine (55554754)

STAFF MENU
My Profile
Dashboard
Agreement
My Reviews
Employees

ADMIN MENU
Manage Users
Manage Adhoc
Manage Dates
Manage Issues
Permis Manager
System Reports
Logout

My staff members
Manage Staff and Transfer and Rate their Performance Agreements.

2018/2019 PERFORMANCE REVIEW ANNUAL ASSESSMENT

STAFF CAPTURE TRANSFER AGREEMENT STAFF REPORT

PERFORMANCE REVIEW FOR 2018 CYCLE SIGN OFF LIN SIGN

DIRECT SUBORDINATES ALL SUBORDINATES SUBORDINATE HIERARCHY

Show 10 entries Search:

<input type="checkbox"/>	Persal no.	Surname / Full Names	Job Title	Level	Staff Sign Off	Super. Sign Off	
<input type="checkbox"/>	50000006	Emmanuel Blaise Nkosi	Director	12	Pending signoff	Pending signoff	

Showing 1 to 1 of 1 entries Previous Next

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Type here to search 2:08 PM 9/13/2018

2.1. Rating the Key Result Area (KRA)

After you have selected the employee that you would like to review the following screen will display. This screen allows the supervisor to score each of the key outputs as completed by employee. To rate employee, the supervisor must do the following;

1. Select a KRA by clicking anywhere in the KRA line, once you have selected the KRA the key output will display below.
2. Select the key output.
3. If a user has an Agreed Rating of less than 3 that rating will be highlighted in red, meaning that the employee requires development on that KRA.

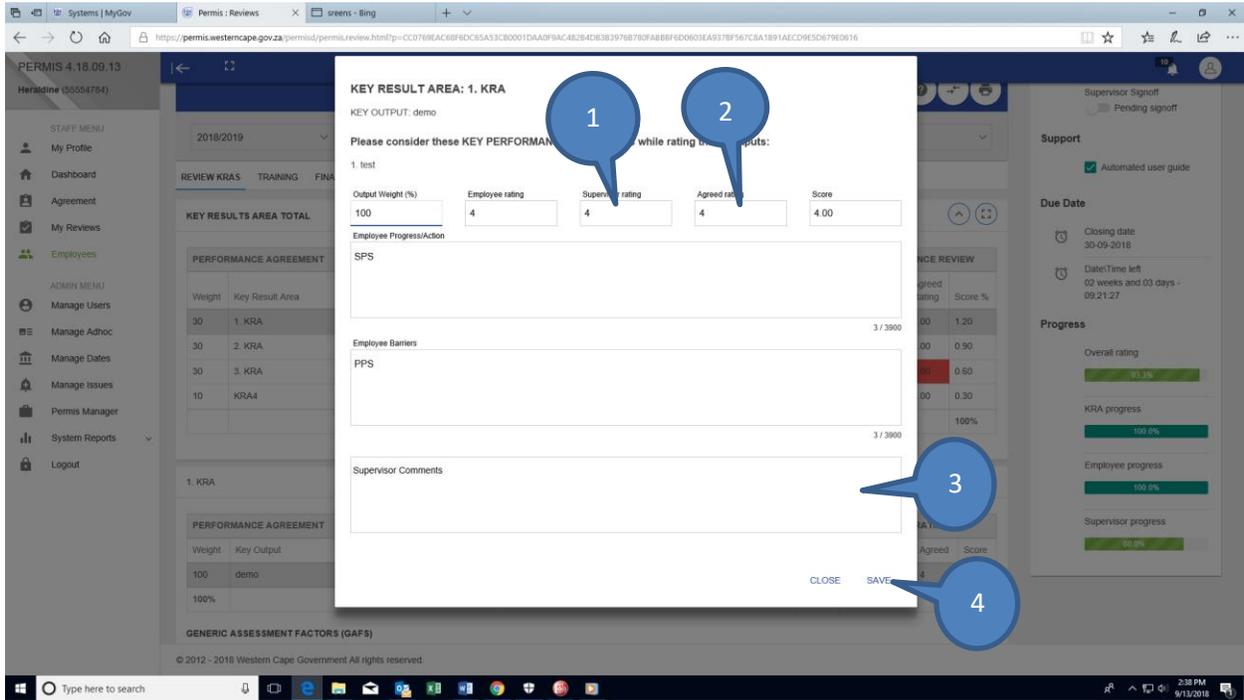
The screenshot displays the PERMIS Performance Review interface. The main content area is titled 'PERFORMANCE REVIEW' and shows a 'KEY RESULTS AREA TOTAL' table. This table has two columns: 'PERFORMANCE AGREEMENT' and 'PERFORMANCE REVIEW'. The 'PERFORMANCE AGREEMENT' table lists KRAs with their weights. The 'PERFORMANCE REVIEW' table lists the Agreed Rating and Score % for each KRA. A callout '1' points to the '1. KRA' row in the 'KEY RESULTS AREA TOTAL' table. Below this, the 'PERFORMANCE AGREEMENT' table is expanded to show 'SELECTED KEY OUTPUT RATINGS' for '1. KRA'. A callout '2' points to the 'demo' key output in this table. The 'PERFORMANCE REVIEW' table shows an 'Agreed Rating' of '2.00' for '1. KRA', which is highlighted in red. A callout '3' points to this red '2.00' rating. The right sidebar shows progress bars for 'KRA progress' (100%), 'Employee progress' (100%), and 'Supervisor progress' (80%).

PERFORMANCE AGREEMENT		PERFORMANCE REVIEW		
Weight	Key Result Area	Weight	Agreed Rating	Score %
30	1. KRA	30	4.00	1.20
30	2. KRA	30	3.00	0.90
30	3. KRA	30	2.00	0.60
10	KRA4	10	3.00	0.30
		100%		100%

PERFORMANCE AGREEMENT		SELECTED KEY OUTPUT RATINGS				
Weight	Key Output	Weight	Staff	Super	Agreed	Score
100%	demo	100	4	4	4	4.00
		100%				4.00

After one have selected a Key Output the below screen will display. The supervisor must do the following;

1. Capture the *Supervisor Rating*
2. Capture the *Agreed Rating*
3. Capture the *Supervisor Comments*
4. Click on the *Save* button to save information



**Please note these steps must be followed for all KRA's with Outputs.*

2.2. Areas of improvement

Please note that this screen will only display if a KRA has a Rating below 3. All the KRA's less than 3 will reflect under the Areas of Improvement. Areas of improvement are completed by the supervisor.

1. Select the areas of improvement tab
2. Select the a KRA that
3. Then select the Generic Assessment Factor relevant for that KRA

The screenshot displays the 'AREAS OF DEVELOPMENT' section of a performance review system. It features a navigation menu on the left, a main content area with tabs for 'REVIEW KRAS', 'FINAL SCORE', 'TRAINING', and 'AREAS OF DEVELOPMENT'. The 'AREAS OF DEVELOPMENT' section includes a dropdown for 'SELECT KEY RESULT AREA' (showing '3 KRA') and a dropdown for 'SELECT GENERIC ASSESSMENT FACTOR' (showing 'Communication'). Below these is a table for 'COURSES' with columns for 'Provider', 'Category', and 'Time Frame', displaying 'No Training Needs Found'. On the right, there is a 'Support' section with 'Automated user guide' checked, and a 'Due Date' section with 'Closing date 30-09-2018' and 'Days left 03 days'. Progress bars for 'Overall rating 93.3%', 'KRA progress 100.0%', 'Employee progress 100.0%', and 'Supervisor progress 88.8%' are also visible.

*Please follow these steps for all KRA displayed under Areas of Improvement

After all the above has been completed the supervisor must capture his/her final comments

1. Capture Supervisor comments
2. Save Supervisor comments

PERMIS 4.18.09.13
Heraldine (55554784)

STAFF MENU
My Profile
Dashboard
Agreement
My Reviews
Employees

ADMIN MENU
Manage Users
Manage
Manage
Permis Manager
System Reports
Logout

Emmanuel Blaise Nkosi's Performance Review
The mid-year review is open for the capturing of scores by both the employee and supervisor.

2018/2019 PERFORMANCE REVIEW MID YEAR REVIEW (01 APR 2019)

REVIEW KRAS FINAL SCORE TRAINING AREAS OF DEVELOPMENT

FINAL RATING

FINAL SCORE
100%

CAPTURE SUPERVISOR COMMENT
GOOD WORK NEED TRAINING ON ONE AREA

35 / 3000

PERFORMANCE CATEGORY: FINAL SCORE (%)	LEVEL 1: Not Effective 0 - 86%	LEVEL 2: Partially effective 87 - 99%	LEVEL 3: Fully effective 100 - 119%	LEVEL 4: Highly effective 120 - 133%

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Signoffs
Employee signoff
Pending signoff
Supervisor Signoff
Pending signoff

Support
Automated user guide

Due Date
Closing date
30-09-2018
Date/Time left
02 weeks and 03 days -
14:26:29

Progress
Overall rating
83.3%
KRA progress
100.0%
Employee progress
100.0%
Supervisor progress
88.8%

2.3. Sign-off Review

Note: After the Supervisor has completed the supervisor review area. The Employee can signoff the review, if he/she agrees with what has been captured by the Supervisor. By selecting

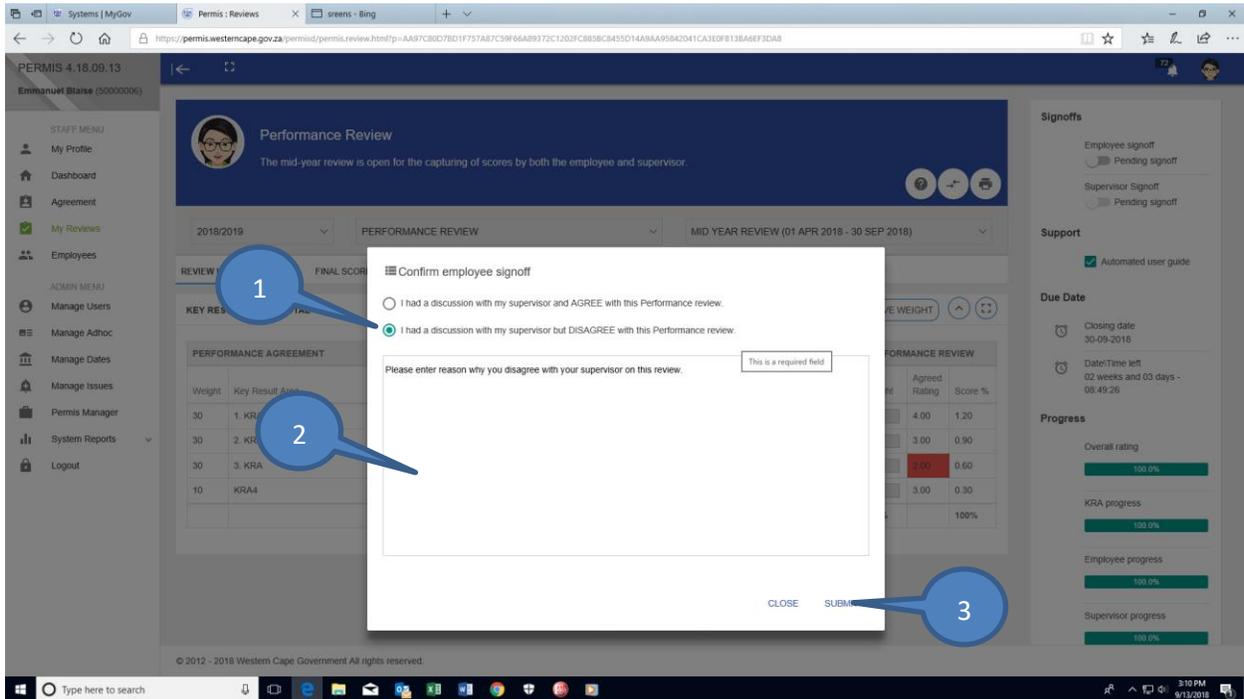
1. I had a discussion with my supervisor and AGREE with this Performance review, then;
2. Click on the signoff button.

The screenshot displays the 'Performance Review' interface for Emmanuel Blaize (50000006). The main content area shows a 'PERFORMANCE REVIEW' section with a 'MID YEAR REVIEW (01 APR 2018 - 30 SEP 2018)' period. A modal dialog box titled 'Confirm employee signoff' is open, containing two radio button options: 'I had a discussion with my supervisor and AGREE with this Performance review.' (selected) and 'I had a discussion with my supervisor but DISAGREE with this Performance review.' A blue circle labeled '1' points to the 'AGREE' option, and another blue circle labeled '2' points to the 'SIGNOFF' button. The background interface includes a sidebar menu with options like 'My Profile', 'Dashboard', 'Agreement', 'My Reviews', 'Employees', 'Manage Users', 'Manage Adhoc', 'Manage Dates', 'Manage Issues', 'Permis Manager', and 'System Reports'. The right sidebar shows 'Signoffs' (Employee signoff: Pending signoff, Supervisor Signoff: Pending signoff), 'Support' (Automated user guide), 'Due Date' (Closing date: 30-09-2018, Date/Time left: 02 weeks and 03 days - 08:50:29), and 'Progress' (Overall rating: 100.0%, KRA progress: 100.0%, Employee progress: 100.0%, Supervisor progress: 100.0%). A table titled 'KEY RESULTS AREA TOTAL' is visible below the dialog box.

Weight	Key Result Area	Score	Weight	Score %
30	1. KRA	30	4.00	1.20
30	2. KRA	30	3.00	0.90
30	3. KRA	30	1.00	0.60
10	KRA4	10	3.00	0.30
			100%	100%

If the employee is not in agreement, he/she can disagree by;

1. Selecting the “I had a discussion with my supervisor but DISAGREE with this Performance review”
2. Then provide reason for disagreeing
3. Then click on the submit button to save information.



Once that review has been completed and signed off by both employee and supervisor you can print a report. Print Screens for reviews will be available at later stage.