
Annual Performance Appraisal

How to review an Appraisal on Progress

This sheet provides you with instructions on how to complete an Annual Performance Appraisal Review on the online system, Progress.

View eligible staff review submissions in Progress

1. Log into [Progress](#) with your University credentials.
2. Once you have logged in the Progress dashboard will be displayed.
3. To access the Annual Performance Appraisal submissions, click on **Workflow Type** and select **Annual Performance Appraisal**. When selected the workflow type will turn yellow.
4. Ensure the user type is set to **Reviewer**.
5. You will see some drop-down menus in the submissions area. You may need to use these filters, to view the submissions by Year or Department.
6. A list of all eligible staff will appear in the submission area.

Completing a Staff Appraisal Review

7. To access a applicants completed review click on the staff members name highlighted in blue.
8. In the top section of the applicant's statement their personal information are displayed.
9. Below this section is the applicant's statement, CV and supporting material for you to review.
10. Enter your review comments and key objectives in the **First Reviewer** field
11. Date when the review took place in the **Interview Date** field and whether performance was satisfactory, and a progression increase is recommended.

Adding supporting Material to the review

12. You may wish to upload supporting documents. These will need to be in the format of doc, docx, xls, xlsx and pdf. The limit of the size of each document is 15MB.
13. To upload the documents, click on the arrow on the right-hand side in the Reviewer Supporting Materials field, this will expand the section.
14. To attach documents, click on **Browse**. This take you through to the drives where your documents are located. Select the document you wish to upload.
15. When the document appears in **File**, click on it, then **Open** and **Upload File**.
16. If you want to remove a document after you have saved it, click on the **X** button beside the file name in the Reviewer Supporting Materials area.

Submitting the Review

17. Once you have completed the review and all the required documentation has been provided, tick the **Declaration box**.
18. To submit the submission, click on the **Submit Forward** button. This will forward the submission to HR. You will see a submitted successfully message at the top right of the screen.

The system does not notify the staff member when a submission has been submitted. The staff member will be able to read the comments on Progress once they have been notified by Human Resources.

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Additional Information

Incomplete submissions

The Head of Departments and Department Administrators can send the submission back to the staff member if they need to add further information.

In the Dashboard click on the staff member you wish to return the submission to. Then click **Return to Previous** under the Actions field. Once completed advise the staff member the submission has been sent back to them.

Re-assigning the Review to another reviewer

HoD and Administrators can delegate the review to a supervisor/principal investigation, and they will become the reviewer.

This change can be performed by the HoD or Client Services staff. Instructions are available at the following link [Re-assigning Reviewers in Progress](#) .

Where the review has been assigned to another review, they are able to make comments on the employees' performance in the First Review Comments field. Where a HoD delegates a review, they still have access to the review and can make or edit comments in the First Reviewer Comments field.

Confirmation Path Staff

Human Resources will upload the most recent completed confirmation report and move the review to "First Review" status. The HoD can mark "performance satisfactory" and "salary progression" if appropriate.

- There is no requirement for further comments by staff members unless the HoD requests it.
- If the HoD does require further information they can "Return to Previous" and ask the staff member to add what is required (for example, if the completed confirmation report is several months old).

Promotion applicants are included in the review

Staff who applied for promotion are included in the review. Human Resources will upload the promotion statement to the Progress review.

- For staff unsuccessful in their promotion, a review must be completed.
- For staff successful in their promotion, it is up to the HoD whether a review is needed. Even if no assessment of the review period is necessary, HoD may wish to discuss and record objectives and academic goals with staff who are promoted.