Performance Module Guide

EPM Connect Guide

Document Control

Document Overview: This document outlines the step-by-step process for all tasks managed within the Performance Management Module in EPM Connect..

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Author: Lauren McGuire, Product Manager, Product Management

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Document Approval
The Director of Operational Excellence shall review this guide annually and shall determine whether any further changes need to be made prior to approval.

This document was approved by Keren Prior, Director of Operational Excellence on 23rd October 2025 and is issued on a version-controlled basis under her signature.

Document History

Date of Change	23rd October 2025
Summary of Change	Changes to improve clarity.
New Version Number	v2.0
Changes to be notified to	Director of Operational Excellence

Contents

Performance Management Guide

Our Performance module will provide a comprehensive set of tools designed to empower your workforce and streamline performance management. Empower employees to take ownership of their performance via our user-friendly self-service portal, where they can set objectives, complete reviews and appraisals, and track progress in real time. The module supports collaborative goal setting between managers and employees, with full visibility into individual performance records, including reviews, observations, and objectives.

Monitor performance against national standards, align individual objectives with wider trust or school goals and use analytics to monitor organisational trends and areas for improvement.

Trusts can standardise observations and reviews providing consistency across all your academies and create custom templates to evolve on the standard set by Ofsted. Link individual standards and objectives to your organisations to track progress and effectively manage all staff across the Trust, aiding in more efficient staff and improved staff retention.

General Guidance

Using this guide

Important

It is important to configure the Performance Management Settings first before using the module. Please see the Performance Management Settings Guide for more information.

Once Settings have been configured, we recommend setting up **Performance Records** for your employees first, before adding **Standards**, **Objectives**, **Reviews** and **Observations**. Once these have been added, you can distribute these performance items to employees. **Performance Records** can then be updated over time.

For new employees who join after this initial set up has been undertaken, you can simply distribute the performance items and update their Performance Records over time.

Search functions

Column headings in bold with a magnifying glass icon can be filtered or sorted alphabetically, chronologically, or numerically depending on the content of the column. To sort the column, click on the column heading. Click a second time to reverse the sorting.

To search in a column, click on the magnifying glass in the header of the column you want to search. From the for drop-down list, select the rule for your search then add the criteria in the text box below.

Click **Export** to export this information within a report, in either **Word** or **Excel** format.

Summary (including Metrics)

The Summary section of the module provides a variety of metrics, relating to performance against Standards and Objectives This Cycle. This page also allows you to view New Starters who do not yet have a Performance Record, in addition to those Employees on Probation.

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Summary**. The Performance module is displayed, and a variety of metrics are displayed across the top of the screen.
3. To view more details, click the arrow in the top right-hand corner of any of these metrics to move into specific details and the users they were assigned to.

   Data will only be shown against standards and objectives if these have been completed within the module.

4. Scroll down to view **New Starters** and **Employees on Probation**.

New Starters

New Starters are listed at the bottom of the **Summary** page.

Those with an eye icon in the far right-hand column indicate starters who have had a **Performance Record** created against them. If the employee does not have an eye icon next to their **Job Role**, this means that a **Performance Record** has not yet been created.

This therefore provides a useful tool with which to check any members of staff who have yet to have had a record created.

Click the eye icon to view the employee's record.

Employees on Probation

Scroll down to the bottom of the page and select the **Employees on Probation** tab.

This area will show all members of staff on probation. This should be updated in the **Probation** tab within the Employee's record.

Click the eye icon to view the employee's record.

Troubleshooting

If you cannot find the Performance record of a particular employee, this may mean a record has not been completed.

Performance records are linked to job roles, not specific employees, so multiple records should be created and will be seen for the same employee against each role they hold.

If the current **Appraisal Cycle** has ended, no records will be displayed.

New **Performance Records** should be completed for new employees and those employees who have had a change of job role.

New **Performance Records** must be created for each appraisal cycle. Once the new appraisal cycle begins, all records will move into the **Historic Records** section. All of the standards and settings will remain, but a new Performance Record will be created.

Create Performance Records

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Performance Records**. A list of further menu options is displayed.
3. Select **Create Records**. The Performance Records page is displayed.

   The page will display all employees who have been added to the system but do not have a performance record.

   If the employee is not listed, a Performance Record has already been set up.

   Once a record has been created, the employee's name will be removed from the list within **+ Create Performance Records**.

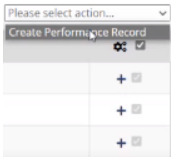
   ### Important

   You can create multiple performance records at the same time.

   However, records can only be created at the same time if the **Reviewer** for the employee is their **Line Manager** or the same **Reviewer**.

   If the **Reviewer** is not the same, they must be added individually.

4. Tick the box on the far right-hand side of the employees for which you wish to create performance records or select the box in the column header to select all employees listed.
5. From the drop-down menu above, select **Create Performance Record**. A new window is displayed.

   The reviewer can be changed from within the performance record for each job role. If an individual other than the employee's **Line Manager** is selected to manage the reviews, it may be useful to filter via **Department** or **Job Role** using the magnifying glass, before selecting the **Reviewer**.

6. From the drop-down menu select the reviewer role that applies.
7. Click **Save** to finish.

Troubleshooting

If the reviewer is not receiving review notifications, check the reviewer. If the reviewer has been set as **Line Manager**, the correct Line Manager must be set up within the **Reports to** field within the **Employee Record**.

Standards

The **Standards** section allows you to view a list of all standards, who they have been applied to and distribute standards across employees.

View and edit standards

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Standards**. A list of further menu options is displayed.
3. Select **All Standards** tab to view the standard sets.
4. Click on the name of the relevant standard set to edit the standard set information.
5. Edit the relevant fields and click **Save** to finish.

6. Scroll down to view the individual standards relevant to that standard set.

   The **Standards** tab displays the standards within this standard set.

   The **Applied To** tab displays the employees that standard has been applied to.

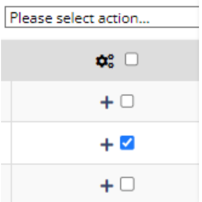
   The **Distribution** tab allows you to distribute the standards to employees.

7. Click the pencil icon next to the relevant standard, to edit the standard.
8. Edit the relevant fields and click **Save** to finish.

9. Click the **x** icon to delete the standard.

Distribute standard sets across multiple employees

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Standards**. A list of further menu options is displayed.
3. Select **All Standards** tab to view the standard sets.
4. Select the **Sets of Standards** tab to view the standard sets.
5. Click on the name of the relevant standard set to edit the standard set information.
6. Scroll down to view the individual standards relevant to that standard set.
7. Select the **Distribution** tab.
8. Tick the box next to the employees you wish to apply the standard to, or tick the box in the title header to apply the standard to all employees.



Top Tip

If you want to distribute the standards to a specific type of employee, for example all Support Staff, or all Finance Staff, use the magnifying glass next to the column headings to filter the data. Then click the box in the far-right header to apply the standards to all employees listed.

9. Click the **Please select action** drop-down menu and select **Add to Performance Records**.

Create new standard sets

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Standards**. A list of further menu options is displayed.
3. Select **Create Standards** to view the standard sets.
4. In the **Standard Type Title** field, enter a title.

   This is a mandatory field.

5. In the **Description** field, enter a description.
6. From the **Standard Rating Group** drop-down menu, select a group.

   This is a mandatory field.

7. Click **Save** to finish.

   Save

Add new standards to standard sets

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Standards**. A list of further menu options is displayed.
3. Select **All Standards** to view the standard sets.
4. Click on the name of the relevant standard set to edit the standard set information.
5. Click the **+ Create Standard** button.

   + Create Standard

6. In the **Standard Name** field, enter a name.

   This is a mandatory field.

7. In the **Description** field, enter a description.
8. Click **Save** to finish.

   Save

Add ratings and evidence to employee standards

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Standards**. A list of further menu options is displayed.
3. Select **All Standards** tab to view the standard sets.
4. Select the **Employee Standards** tab.

   The **Employees Standards** tab displays all standards applied to employees, the name of the employee applied to and the employee and reviewer's rating.

   Use the magnifying glass next to the title of the columns to filter the columns or double click on the title of the column to sort the data.

5. Click the eye icon next to the standard you wish to view. An **Edit Standards** page is displayed.

   You can only edit the fields that are assigned to employer. Any fields to be completed by the employee will be greyed out, for example **Employee Rating**.

6. From the **Reviewer Rating** drop-down menu, select the rating.
7. Click the + **Add Evidence** button to upload any relevant documents.

8. Click **Save** to finish.

Objectives

Objectives Summary

The **Objectives Summary** page provides an overview of your property objectives.

The **Property** is the legal entity, i.e. the school or Central Trust view of the system.

Property Objectives are objectives that relate to the entire property – i.e. school or trust objectives.

To view more detail on Employee Objectives please visit the **Employee Objectives** page.

Click the **Unmet Property Objectives** tab to view objectives that have yet to be met and click **Met Property Objectives** to view those already met.

Property Objectives

Property Objectives can be created for the school(property) or Trust – i.e. aims for the Trust. For example, attendance or objectives relating to grades.

Objectives created for employees can be linked to an overall property objective.

Create Property Objective

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Objectives**. A list of further menu options is displayed.
3. Select **Property Objectives.** The Property Objectives page is displayed with a table containing a list of all objectives.
4. Click the **Create Objective** button. The **Edit Objective** window is displayed.

When an objective is added to the system, it needs to be agreed by the employee. The employee will receive a notification asking them to approve the objective. Once the objective has been agreed by the employee the **Title** and **Performance Criteria** fields are locked and cannot be changed.

Commented [JM1]: Where will it go? Does it create a task, or is it a notification in the Performance Management module?

5. In the **Title** field, enter a title.

This is a mandatory field.

Module Tip!

If you wish to monitor the performance of individual departments, for example the progress of objectives related to grades, it may be useful to relate the titles of the objectives to these departments, for example 'Achieve 80% for all students C or above grades – Maths.'

6. In the **Description** field, enter a description.
7. From the **Status** drop down, select a status.

This is a mandatory field.

8. In the **Due Date** field, select a date.

   This is a mandatory field.

9. Click **Save** to finish. The record has been updated.

   Property Objectives can be linked to **Employee Objectives**. This can be done within the **Employee Objective** page and will then be displayed within the **Linked Objective** tab below the Property Objective.

View and update Property Objectives

Objectives created for employees can be linked to an overall property objective. These can be viewed by clicking on the **Linked Objectives** tab at the bottom of the page within each individual property objective.

The **Linked Objective** tab will display all individual employee objectives linked to the property objective, with the name of the employee this relates to and the status of the objective. If the status is predominately met, this will indicate that the property objective is on target to being met.

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Objectives**. A list of further menu options is displayed.
3. Select **Property Objectives.** The Property Objectives page is displayed with a table containing a list of all objectives.
4. Click the eye icon next to the objective you wish to view. An **Edit Objective** page is displayed.
5. From the **Status** drop-down menu, select a status.
6. Once the status has been changed to **Met**, select the **Date Completed**.

Add Evidence

1. Select the **Evidence** tab.
2. Click the + **Add Evidence** button to upload any relevant documents.

3. In the **Title** field, enter a title.
4. In the **Note** field, enter a note
5. Click the Upload file button to upload documents.

   .

6. Click **Save** to finish. The record has been updated.

Employee Objectives

Employee Objectives can be created for employees and where relevant linked to **Property Objectives**. For example, an employee objective related to lesson planning may relate to a wider planning-based property objective.

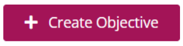
These can be viewed within the **Employee Objectives** page but must be added within the individual **Performance Record** of the employee.

Create Employee Objective

Employee Objectives can only be set within the Performance Record and cannot be distributed en masse as they are tailored to the individual. They can also only be added by the reviewer, not the employee. When an objective is added to the system, it needs to be agreed by the employee. The employee will receive a notification to approve the objective.

Property objectives can be linked to **Employee Objectives**.

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Performance Records**. A list of further menu options is displayed.
3. Select **Current Records.** The **Employee Performance** page is displayed, with a table containing a list of all employees with a performance record.
4. Click the eye icon next to the employee record you wish to view. The **Employee Performance Record** is displayed.
5. Select the **Objectives** tab.
6. Click the **Create Objective** button. The **Edit Objective** window is displayed.

   When an objective is added to the system, it needs to be agreed by the employee. The employee will receive a notification to approve the objective. Once the objective has been agreed, the **Title** and **Performance Criteria** fields are locked and cannot be changed.

7. In the **Title** field, enter a title.

   This is a mandatory field.

8. In the **Performance Criteria** field, enter a list of criteria.
9. In the **Monitoring and Evidence** field, enter a list of criteria.
10. From the **Property Objective Link** drop-down menu, select the property objective you wish to link to the employee objective.
11. From the **Status** drop down, select a status.

    This is a mandatory field.

12. In the **Date Due** field, select a date.

    This is a mandatory field.

13. Click **Save** to finish. The record has been updated.

View and update Employee Objectives

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Objectives**. A list of further menu options is displayed.
3. Select **Employee Objectives.** The **Employee Objectives** page is displayed with a table containing a list of all objectives.
4. Click the eye icon next to the objective you wish to view. An **Edit Objective** page is displayed.
5. From the **Status** drop-down menu, select a status.
6. Once the status has been changed to **Met** select the **Date Completed**.

Link to Property Objective

1. From the **Property Objective Link** drop-down menu, select the property objective you wish to link to the employee objective.

Add Evidence

1. Select the **Evidence** tab.
2. Click the + **Add Evidence** button to upload any relevant documents.

3. In the **Title** field, enter a title.
4. In the **Note** field, enter a note
5. Click the Upload file button to upload documents.

.

6. Click **Save** to finish. The record has been updated.

To view previous employees, click the View Previous Employees button.

Reviews

Reviews can only be completed within the main **Reviews** page but can be viewed within the individual performance records.

Create a Review Template

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Reviews**. A list of further menu options is displayed.
3. Select **Review Templates**. The Review Templates page is displayed.
4. In the **Review Title** text box, enter a title.

   This is a mandatory field.

5. From the **Review Description** text box, enter a description.
6. From the **Review Type** drop-down menu, select a type.

   This is a mandatory field.

7. Tick the appropriate boxes that apply regarding **Include Standards**, **Include Objectives**, **Include Observations**, **Include Pay Progression**, **Include Final Appraisal Rating**, **Require Employee Review Acknowledgement.**

   Unlike an objective, reviews do not need to be agreed by the employee. However, if you wish for the employee to acknowledge the review, tick the **Require Employee Review Acknowledgement** box. The employee will receive a notification asking them to acknowledge the review. Once the review has been approved by the employee, the review will be locked and cannot be changed.

8. From the **Rating Group** drop-down menu, select a rating group.

   This is a mandatory field.

   The **Reviewer** and **Employee Reviewer** can be sent a form to complete ahead of the review and you can choose from the list of forms you have added in **Settings**. This is not mandatory but if you choose to use this function select a time frame in **Time To Complete** and select the relevant forms in **Employee Review Form** and **Reviewer Review Form**.

9. In the **Time to Complete** text box, select enter a number and select **Days**, **Weeks** or **Months**.

   This is a mandatory field.

10. From the **Employee Review Form** drop-down menu, select a form.
11. From the **Reviewer Review Form** drop-down menu, select a form.
12. Click **Save** to finish.

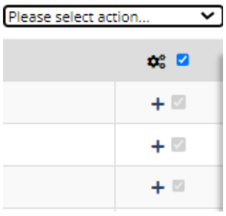
Distribute Review Template

Once **Review Templates** have been created, you can distribute the review template to **Performance Records**. The **Distribute** tab will display all Performance Records, including records from previous years. We therefore recommend filtering by **Appraisal Cycle**, selecting the current cycle to ensure you distribute any review templates to current and not historical Performance Records.

Reviews can be distributed by line managers and reviewers or by administrators, depending on permissions set up.

1. Select the **Distribute** tab.
2. Within the **Appraisal Cycle** column title, select the magnifying glass icon and enter the year that the current cycle ends.
3. Click the plus button on the far-right hand column of the relevant employee.

   To select multiple employees, click the box in the far right-hand column of all relevant employees or the box within the column heading and click the **Please Select Action** button to distribute the Review Template.

4. Click **Save** to finish.

Edit Review Templates

This page will display all of the Review Templates that have been created in this property. These can be scheduled against employees for their assigned reviewer to complete.

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Reviews**. A list of further menu options is displayed.
3. Select **Review Templates**. Review Templates page is displayed.
4. On the left-hand side of the system window, click **Performance**. A list of further menu options is displayed.
5. Click **Reviews**. A list of further menu options is displayed.
6. Click **Review Templates**. Review Templates page is displayed.
7. Click the eye icon next to the template you wish to view. A new page is displayed.
8. Edit the fields as appropriate.
9. Click **Save** to finish.

Complete/Update a Review

The reviewer will receive a notification either via the system or via email; however reviews can be completed via the employee record.

To support in completing the review, the reviewer can scroll down to the bottom of the page to view the **Standards**, **Objectives**, **Areas for Development** and **Evidence**.

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Performance Records**. A list of further menu options is displayed.
3. Select **Current Records**. The Performance module is displayed with a table containing a list of all performance records.
4. Click the **Full Name** of the record you wish to view. The **Employees Performance Record** is displayed.
5. Select the **Reviews** tab.
6. Click the pencil icon on the far right-hand side of the employee's record you wish to view.

   The employee will complete the questions within the **Employee Questionnaire** tab and the reviewer will be able to review the employee's responses once completed. The reviewer cannot make changes to the **Employee Questionnaire**.

   The Reviewer's responses will not be visible to the employee unless the **Visible to Employee** tab has been ticked.

7. In the **Date Completed** text box, enter the date the review was completed.
8. In the text boxes provided, complete the responses to the questions within the **Reviewer Questionnaire** tab.
9. Click **Save** to finish.

10. Click the **Download Review** button to download the review. This will appear within your downloads.

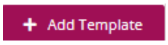
    The downloaded document will include the property logo and the name of the school. This can be downloaded and used within the review itself and the notes updated following the review, or the document uploaded into the system.

Observations

This section allows you to create observation templates and view observation performance.

Create Observation Template

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Observations**. A list of further menu options is displayed.
3. Select **Observation Templates**. The Observation Templates page is displayed.
4. Click the **+ Add Template** button.



5. In the **Observation Title** text box, enter a title.

   This is a mandatory field.

6. From the **Observation Type** drop-down menu, select an observation type.

   This is a mandatory field.

7. Select the **Include Comments** and **Include Final Appraisal Rating** tick boxes where appropriate.
8. From the **Rating Group** drop-down menu, select a rating group.

   This is a mandatory field.

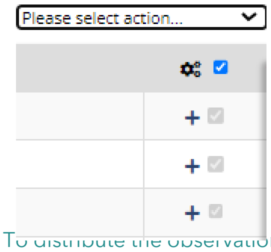
9. In the **Time to Complete** text box enter a number and select **Days**, **Weeks** or **Months** from the drop-down menu.

   This is a mandatory field.

10. From the **Observation Review Form** drop-down menu, select the relevant form.
11. Click **Save** to finish. The **All Observations** page is displayed.

Distribute Observation Template

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Observations**. A list of further menu options is displayed.
3. Select **Observation Templates**. The Observation Templates page is displayed.
4. Select the **Observation Template** you wish to distribute.
5. Select the **Distribute** tab.
6. Within the **Appraisal Cycle** column title, select the magnifying glass icon and enter the year that the current cycle ends. This reloads the distribution list to include employees within the relevant appraisal cycle.
7. Click the plus button on the far right-hand column of the relevant employee. A new **Distribute Observations** window is displayed.



To distribute the observation to multiple observers, repeat the process.

To select multiple employees, click the box in the far right-hand column of all relevant employees or the box within the column heading and click the **Please Select Action** button to distribute the Observation Template

Alternatively add a question within the observation form regarding who was present during the observation and record any additional responses as evidence.

8. From the drop-down menu, select the **Observer**.
9. Click **Save** to finish. The record has been updated.

Complete Observation

Observations cannot be created or distributed via the employee's performance record but can be viewed and completed.

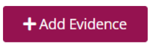
1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Performance Records**. A list of further menu options is displayed.
3. Select **Current Records**. The Performance module is displayed with a table containing a list of all performance records.
4. Click the **Full Name** of the record you wish to view. The Employees Performance Record is displayed.
5. Select the **Observations** tab.
6. In the **Observer Comments** text box, enter any relevant comments.
7. In the **Date Completed** text box, enter the date the observation was completed.

   The reviewer's responses will not be visible to the employee unless the **Visible to Employee** tab has been ticked.

8. In the text boxes provided, complete the responses to the questions.

   The employee will complete the questions. The reviewer cannot make changes to the **Employee Comments**.

9. Click the **+ Add Evidence** button to add evidence.



Performance Records

This page allows you to both view a list of employees who do not currently have a performance record and to create performance records for individual or multiple employees.

View Current Records

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Performance Records**. A list of further menu options is displayed.
3. Select **Current Records**. The **Employee Performance** page is displayed.
4. Click the eye icon next to the employee you wish to view. The employee's Performance Record is displayed.

View Historic Records

At the end of each appraisal cycle, the **Employee Performance Records** will move to **Historic Records** and a new performance record should be created for each employee.

View the [Create Performance Records] Guide for more information on how to create a new record.

Performance Summary

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Performance Records**. A list of further menu options is displayed.
3. Select **Current Records**. The **Employee Performance** page is displayed.
4. Click the eye icon next to the employee you wish to view. The employee's Performance Record is displayed.

   The **Performance Summary** tab displays the **Objectives** for the employee, along with the name of the **Reviewer**, a list of **Upcoming Events** and a number of analytics related to the selected **Standard Set**.

   Objectives: Hover over the objectives to see whether they have been **Met** or are **Ongoing**.

   Reviewer: Click the pencil icon to change the **Reviewer**.

   Upcoming Events: This will list any objectives that are approaching their due date.

   Select Standard Set: This section allows you to select the **Standard Set**. The Standard Set applied will be reflected in the analytics displayed.

   Analytics include **Employee Average Standard Rating** and **Reviewer Average Standard Rating**.

Change the Reviewer within a Performance Record

1. Click the pencil icon next to the name of the **Reviewer** to change it. A new **Edit Reviewer** window is displayed.

2. From the drop-down menu, select the reviewer.
3. Click **Save** to finish.

Standards

This tab allows you to view all the standards that have been assigned to the employee, add ratings against each standard and add new standard sets.

View and update performance against standards

Here you are able to view and each set of standards applied to employees.

1. Select the **Standards** tab to view the standards applied to the employee.
2. Click on the name of the relevant standard set to edit the standard set information.
3. From the **Reviewer Rating** drop-down menu, select a rating.

   The **Employee Rating** can only be completed by the employee themselves, via the **Performance** page within **My Portal**.

4. Click **Save** to finish.

Add Evidence

1. Select the **Evidence** tab.
2. Click the **+ Add Evidence** button to upload any relevant documents.

3. In the **Title** field, enter a title.
4. In the **Note** field, enter a note
5. Click the **Upload file** button to upload documents.

.

6. Click **Save** to finish. The record is updated.

Add standards against an employee

1. Select the **Standards** tab.
2. Click the **+ Add Standards Set** button.

3. Select the **Standards Set**(s) you wish to add.
4. Click **Save** to finish.

Objectives

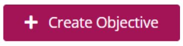
Employee Objectives can be created for employees and where relevant linked to **Property Objectives**. For example, an employee objective related to lesson planning may relate to a wider planning-based property objective.

These can be viewed within the **Employee Objectives** page but must be added within the individual **Performance Record** of the employee.

Create objective

Objectives can only be set within the Performance Record and cannot be distributed en masse as they are tailored to the individual. They can also only be added in by the reviewer, not the employee. When an objective is added to the system, it needs to be agreed by the employee. The employee will receive a notification asking them to approve the objective.

1. Select the **Objectives** tab.
2. Click the **Create Objective** button. The **Edit Objective** window is displayed.



   When an objective is added to the system, it needs to be agreed by the employee. The employee will receive a notification asking them to approve the objective. Once the objective has been agreed by the employee the **Title** and **Performance Criteria** fields are locked and cannot be changed.

3. In the **Title** text box, enter a title.

   This is a mandatory field.

4. In the **Performance Criteria** text box, enter performance criteria.
5. In the **Monitoring & Evidence** text box, enter any evidence or information regarding the objective.
6. In the **Property Objective Link** text box select any property objectives that relate to the employee's objective.

   Property Objectives can be created for the school(property) or Trust – i.e. aims for the Trust. For example, attendance or objectives relating to grades.

   Objectives created for employees can be linked to an overall property objective. These can be viewed by clicking on the **Linked Objectives** tab at the bottom of the page within each individual property objective.

The **Linked Objective** tab will display all individual employee objectives linked to the property objective, with the name of the employee this relates to and the status of the objective. If the status is predominately met, this will indicate that the property objective is on target to being met.

If you wish to monitor the performance of individual departments, for example the progress of objectives related to grades, it may be useful to relate the titles of the objectives to these departments, for example 'Achieve 80% C or above grades – Maths.'

7. From the **Status** drop-down menu, select a status.

   This is a mandatory field.

8. In the **Date Due** field, enter the date

   Format: 01 Sep 2025. This is a mandatory field.

9. Once the status has been changed to **Met** select the **Date Completed**.
10. Click the + **Add Evidence** button to upload any relevant documents.

    + Add Evidence

11. Click **Save** to finish. The record has been updated.

    Save

Update objective

1. Select the **Objectives** tab.
2. Click the eye icon next to the objective you wish to view. An **Edit Objective** page is displayed.
3. From the **Status** drop-down menu, select a status.
4. Once the status has been changed to **Met**, select the **Date Completed**.
5. Click the + **Add Evidence** button to upload any relevant documents.

   + Add Evidence

6. Click **Save** to finish. The record has been updated.

   Save

Areas for Development

This area shows all areas of development for the Employee. You may wish to manage these through objectives instead so that you can report on these areas.

1. Select the **Objectives** tab.
2. Scroll down to **Areas for Development.**
3. Click **+ Create Area for Development**

   + Create Area for Development

4. In the **Title** text box, enter a title.

5. From the **Focus** drop-down menu, select a focus.
6. From the **Status** drop-down menu, select a status.
5. In the **Date Added** text box, select a date.
6. In the **Performance Criteria** text box, enter performance criteria.
7. In the **Required Evidence** text box, enter any evidence or information regarding the objective.
8. Click **Save** to finish. The record has been updated.

Reviews

Complete/Update a Review

Reviews can only be completed within the main **Reviews** page but can be viewed within the individual performance records.

The reviewer will receive a notification either via the system or via email however reviews can be completed via the employee record.

To support in completing the review, the reviewer can scroll down to the bottom of the page to view the **Standards**, **Objectives**, **Areas for Development** and **Evidence**.

Observations

Complete Observation

Observations cannot be created or distributed via the employee's performance record but can be viewed and completed.

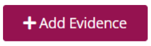
1. Select the **Observations** tab.
2. In the **Observer Comments** text box, enter any relevant comments.
3. In the **Date Completed** text box, enter the date the observation was completed.

   The reviewer's responses will not be visible to the employee unless the **Visible to Employee** tab has been ticked.

4. In the text boxes provided, complete the responses to the questions.

   The employee will complete the questions. The reviewer cannot make changes to the **Employee Comments**.

5. Click the **+ Add Evidence** button to add evidence.



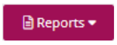
6. Click **Save** to finish.

Audit Trail

The Audit Trail provides an audit of every action undertaken in relation to the employee record you are viewing, including notes, a date and time stamp and the name of the person who made the change.

Reporting

Reports relating to **Performance Management** can be viewed by clicking on the **Reports** button at the top of the screen within the **Performance Records** page.



Trust Overview

All Records

For Trusts, the **All Records** section within the Trust Overview allows you to view all **Performance Records** across the Trust.

To search for the employee, you wish to view click the magnifying glass next to the **Property**, **Full Name**, **Department**, **Job Role** or **Objectives**.

To view an employee's performance record, click the pencil icon next to the employee you wish to view.