Performance Module Settings

EPM Connect Guide

Document Control

Document Overview: This document outlines the step-by-step process for managing settings within the Performance Module in EPM Connect.

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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 Settings Guide

Using this Guide

Settings should be configured before using the module and we recommend completing the tabs within **Settings** in order.

Appraisal Cycle

Every year your employees will have an **Appraisal Cycle** around performance. This includes reviews and observations and will be set with a **Start Date** and **End Date**.

1. On the left-hand side of the system window, select **Performance**. A list of further menu options is displayed.
2. Select **Settings**. The **Performance Management Settings** page is displayed and a variety of metrics is displayed across the top of the screen.
3. Select the **Appraisal Cycle** tab.
4. Click the **+ Add Appraisal Cycle** button.
5. In the **Start Date** text box, select a date.
6. In the **End Date** text box, select a date.
7. Click **Save** to finish.

Ratings

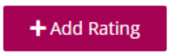
These will either be ratings relating to Trust Standards, Ofsted Grading, or specific Trust or school ratings/gradings. These could be any phrase, word or numbers.

Add Ratings Groups

NB. Ratings cannot be deleted when they are in use.

1. Select the **Ratings** tab. The tab information is displayed.
2. Click the **+ Add Ratings Group** button. The **Rating Group** section expands.

3. In the **Rating Group Title** text box, add a title.
4. Click the **+ Add Rating** button. A new **Create/Edit Rating** window is displayed.



5. In the **Rating Title** text box, enter a title, for example 'Excellent'.
6. In the **Priority Value** text box, enter a value, for example '5'.
7. Click **Save** to finish.

Objectives Status

These are statuses that apply to both employee and property objectives.

1. Select the **Objectives Status** tab. The tab information is displayed.
2. Click **+ Create Objective Status**. The **Objective Status** section expands.

3. In the **Objective Status Title** text box, enter a title.
4. In the **Priority Value** text box, enter a value, for example '5'.
5. Click **Save** to finish.

Areas for Development Focus

Areas for Development which may be agreed following your discussions with employees within Reviews and Appraisals. For example, software skills, time management, planning etc.

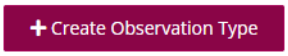
1. Select the **Areas for Development** tab. The tab information is displayed.
2. Click **+ Create Development Focus**. The **Development Focus** section expands.

3. In the **Objective Status Title** text box, enter a title.
4. Click **Save** to finish.

Observation Types

Here you will create a list of observation types, to choose from. For example, Classroom Observations, Virtual Observations, Planning Observations.

1. Select the **Observation Types** tab. The tab information is displayed.
2. Click **+ Create Observation Type**. The **Observation Type** section expands.

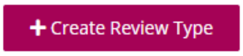


3. In the **Objective Type Title** text box, enter a title.
4. Click **Save** to finish.

Review Types

Here you will create a list of Review Types to choose from. For example, Monthly Reviews, 1 to 1 Meetings, Probation Reviews etc. Choose titles that reflect the type of Reviews, for example 'Teacher End of Year Review Form'

1. Select the **Review Types** tab. The tab information is displayed.
2. Click **+ Create Review Type**. The **Review Type** section expands.

3. In the **Title** text box, enter a title.
4. Click **Save** to finish.

Questions

Here you will create a bank of questions that may be asked within any performance review.

1. Select the **Questions** tab. The tab information is displayed.
2. Click **+ Create Question**. The **Questions** section expands.

3. In the **Question** text box, enter a question.
4. Move the Is **Sensitive** toggle to **YES** or **NO**.
5. Move the Is **Mandatory** toggle to **YES** or NO.

   Moving the toggle to YES will make the question mandatory.

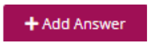
6. From the **Answer Type** drop-down menu, select an option.

   Free text: Allows users to enter any text.

   Yes/No: Restricts users to selecting Yes/No.

   Select from list: Requires users to select from a list of pre-selected options created here within **Performance Settings**.

   Selecting this option will display an **+ Add Answer** button. Click the button and enter a potential answer. Repeat this step for all other possible answers.

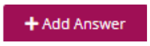
   

   Checkbox: Requires users to check the checkbox if the question asked applies.

   Date: Requires the user to enter a date or select a date form the calendar.

Radio: Requires users to select from a list of pre-selected options created here within **Performance Settings**.

Selecting this option will display an **+ Add Answer** button. Click the button and enter a potential answer. Repeat this step for all other possible answers.



Number: Requires users to enter a numeric answer.

7. Click **Save** to finish.

Custom Forms

1. Here you will create custom forms, which will comprise a list of the questions set up within the **Questions** tab.
2. Select the **Custom Forms** tab. The tab information is displayed.
3. Click **+ Create Custom Form**. The **Custom Form** section expands.

4. In the **Title** text box, enter a title.
5. Click **+ Add Question**. A **Question 1** field is displayed.
6. Select the relevant question

   The questions displayed are the questions you created within the **Questions** section of this guide.

7. Click **Save** to finish.