

# User Manual

## Annual Assessment (Level 1 to 12)

Compiled by:

- Directorate Performance and Priority Unit and
- Directorate Economic Governance and Administration

CORPORATE SERVICES CENTRE

DEPARTMENT OF THE PREMIER

Version 4

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## 1. Capture Annual Assessment Employee

After you have signed in to PERMIS, the “My Profile” will be your landing page. When on the “My Profile” page select “**My Review**” on the left-hand side Menu bar, to capture your Annual Assessment.

The screenshot shows the PERMIS 4 user interface. On the left, a 'STAFF MENU' contains 'My Profile', 'Dashboard', 'Agreement', 'My Reviews', 'User Manuals', and 'Logout'. The 'My Profile' link is highlighted with a blue callout bubble containing the number '1'. The main content area is titled 'User Profile' and displays the following information:

Employee Details			
Personal Number	55554784	Surname	BOOYSEN
Fullname	HERALDINE	Initial	H
Gender	Female	Date of Birth	22-AUG-87
Home Language		Disability	No
Salary Level	9	Department	DEPARTMENT OF THE PREMIER
Job Title	CHIEF ANALYST DEVELOPER	Component	ECONOMIC/GOVERNANCE AND ADMINISTRA...
Post Job Title	CHIEF ANALYST DEVELOPER	Nature of Appointment	FIXED APPOINTMENT: OFFICER PERMANENT
Location	CAPE TOWN	Sub Component	
Appointed Number		Contractor	No
		Probation	No
		Acting	No
		Acting Component	
		Start Date	01-APR-12
		Seniority	

A note at the bottom states: "Note: Any personal information displayed within the Permis application is attained from PERSAL, therefore any changes that is required should be lodged with your Human Resources Component."

### 1.1. Select Annual Assessment

After you have selected the “My Review” tab the below screen will be displayed. Please follow below steps;

1. Select the relevant Performance Cycle year to ensure you work on the right review
2. Select the correct Review Type. This should be “Performance Review”
3. Select the “**Annual Assessment**” will be (April – March) as the review period.

The screenshot shows the 'Performance Review' selection screen. Three blue callout bubbles with numbers 1, 2, and 3 point to the year selection, review type selection, and the 'ANNUAL ASSESSMENT' option respectively. The main content area shows a table for 'KEY RESULTS AREA TOTAL'.

PERFORMANCE AGREEMENT		PERFORMANCE REVIEW	
Weight	Key Result Area	Agreed Rating	Score %
30	Systems Analysis	0.00	0.00
30	Liaison with client	0.00	0.00
30	Quality control (ensures technical and functional standards are observed)	0.00	0.00
10	Training	0.00	0.00
			0%

## 1.2. Key Result Area (KRA)

The weights in the annual assessment should be the same as the Performance Agreement (KRAs as well as outputs - as this covers the entire performance cycle. There are to be no changes to the weights of KRAs or Key Outputs in the annual assessment.

1. To score your Key Outputs you must first select one of your KRA's as displayed on the screen below,
2. The Key Output(s) of that KRA will be displayed as per below screen, Click on the Key Output to capture self-rating, employee progress and barriers.

PERMIS 4.18.09.13  
Emmanuel Blaize (50000006)

REVIEW KRAS FINAL SCORE TRAINING

PERFORMANCE AGREEMENT			PERFORMANCE REVIEW		
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%

KRA RATING: 0.00 KRA SCORE: 0%

2. KRA

PERFORMANCE AGREEMENT		SELECTED REVIEW RATINGS				
Weight	Key Output	Weight	Staff	Super	Agreed	Score
100	DEMO4	0	0	0	0	0.00
100%		0%				0.00

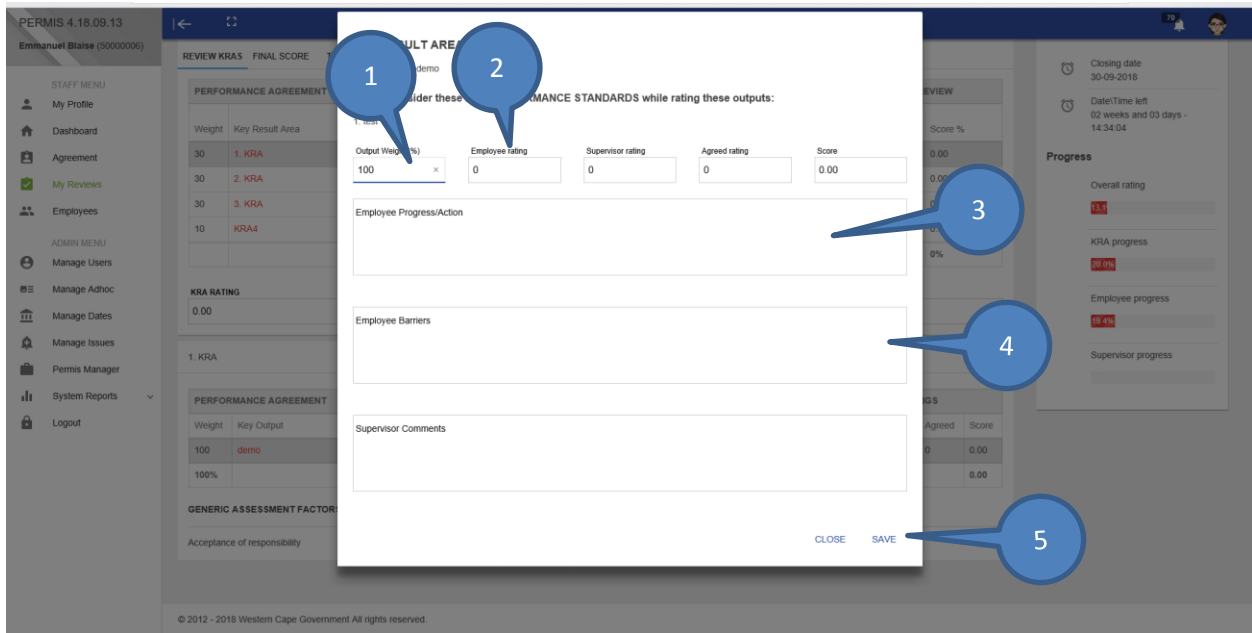
GENERIC ASSESSMENT FACTORS (GAFs)  
Not Applicable

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## 1.3. Key Output Weight and Self Rating

After you have selected the **Key Output**, below screen will be displayed. Please follow below steps; The weights in the annual assessment should be the same as the Performance Agreement as this covers the entire performance cycle. There are to be no changes to the weights of KRAs or Key Outputs in the annual assessment.

1. Capture your **Rating** (the rating can be 1-4, it can only be whole numbers)
2. Capture the **Employee Progress/Actions**
3. Capture **Employee Barriers**
4. Select **Save** to save information captured

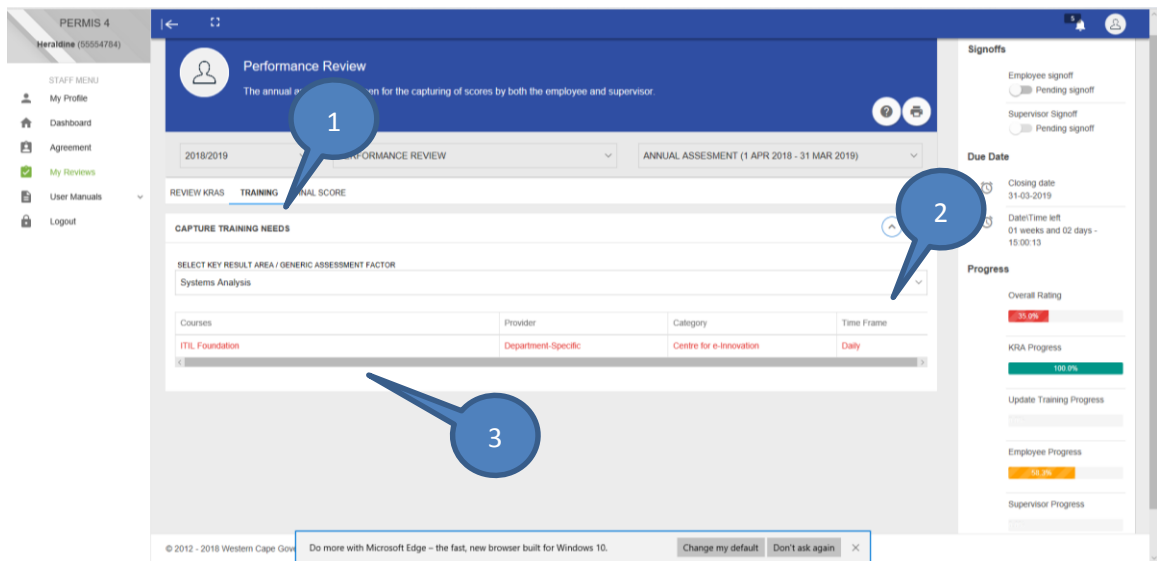


\*Please note these steps must be followed for all key outputs that must be captured

#### 1.4. Update Training Needs

After scoring your key outputs, you will need to update the Training Progress against the training needs selected in the Performance Agreement and Mid-Year Review as per below steps;

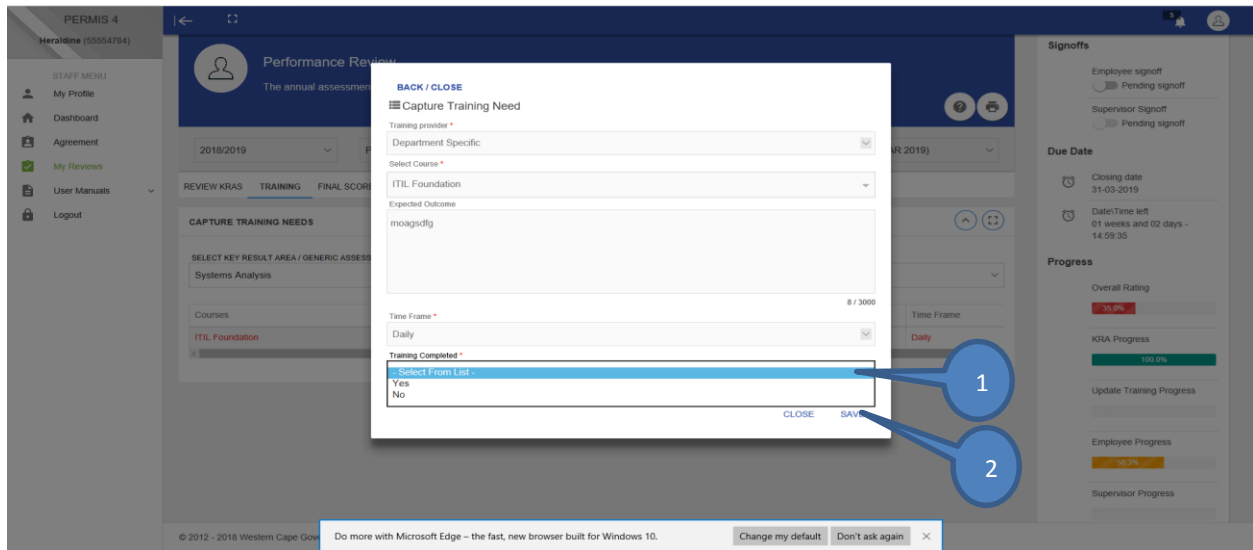
1. Select the **Training Tab** (below screen will display)
2. **Select the KRA's** that have Training needs captured against it.
3. The captured training will display in red below,



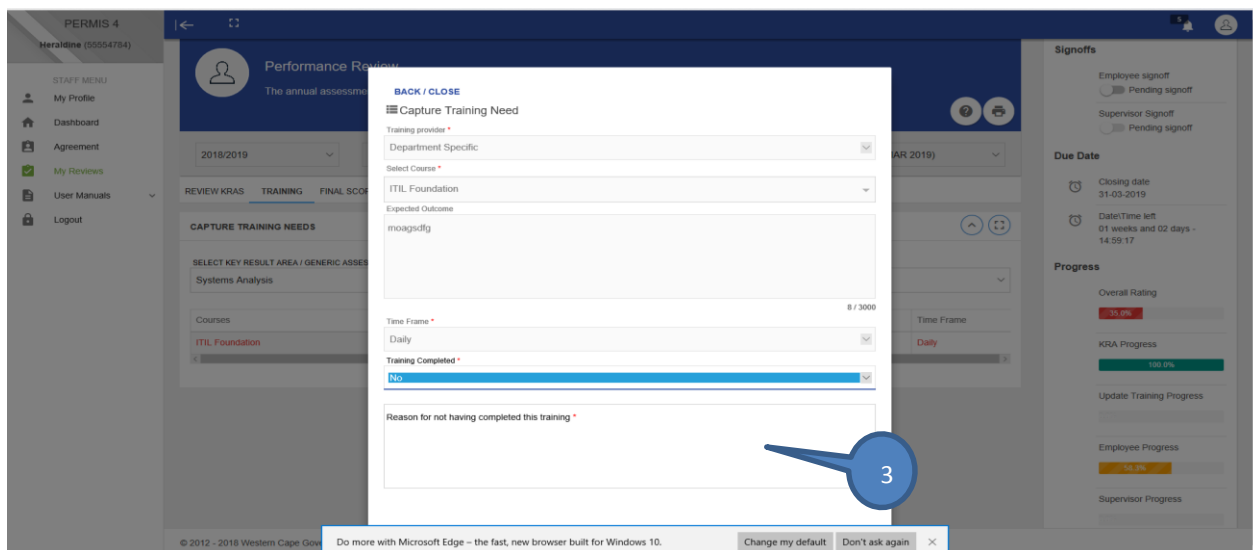
### 1.4.1 Training need update continue...

After you have selected the training need, below screen will be displayed. (Please note you are not allowed to capture any training in the Annual Assessment, only update the status of the training.) [training needs should, at this stage have been captured in the new PA]

1. Select **Training Completed** and update with either 'Yes' or 'No'.
2. If **Yes** you can save and continue. If **No** another field will display.



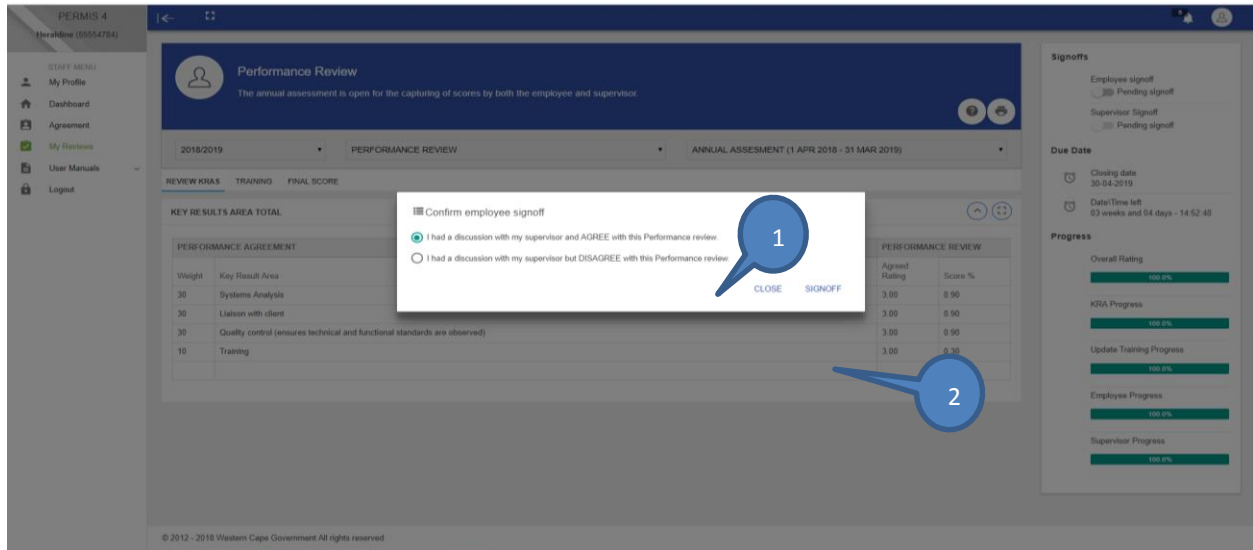
3. If you indicate "No", a text field will display that will require the employee to provide reason(s) as to why training was not completed. See below screen.



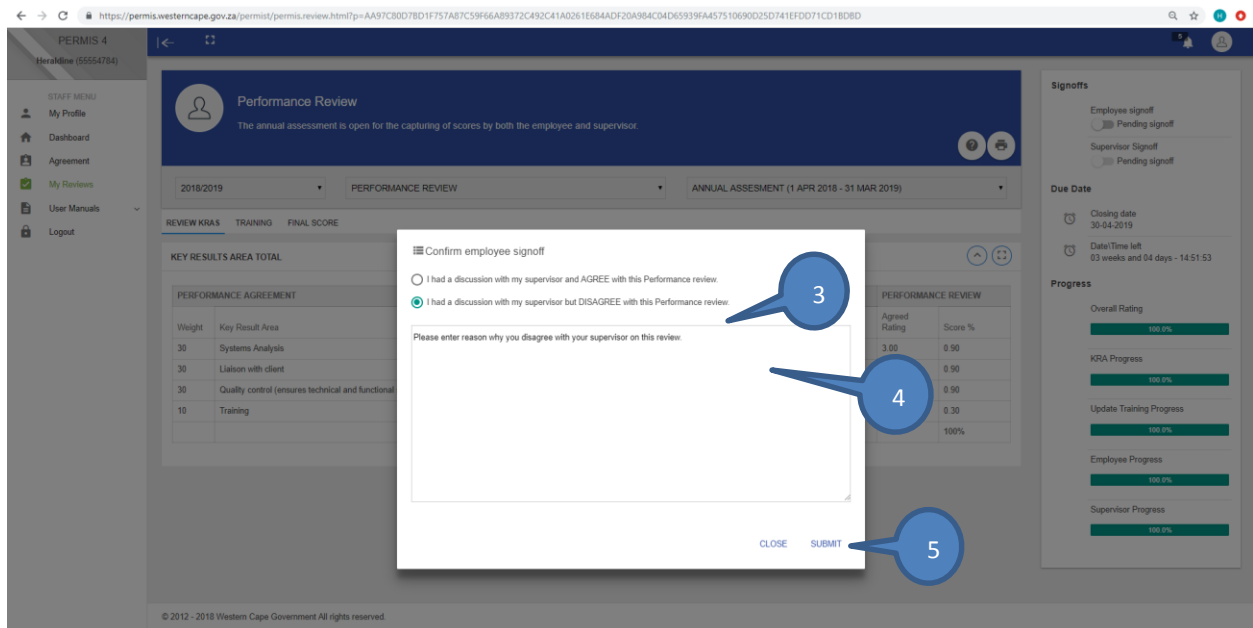
\*Please note that above steps must be followed to update-all training need.

## 1.5. Sign off

1. Select "I had a discussion with supervisor and Agree with this Performance Review"
2. Select **Sign off**



3. Below screen will display if you **Disagree**
4. Capture the **Reason why you Disagree**, then click submit.



## 2. Capture Annual Assessment (Supervisor)

Each employee has selected a relevant supervisor who is responsible to assess their performance. On the supervisor screen, the supervisor has the **Employee tab** through which he/she has access to all his/her subordinates. To assess their performance, please follow below steps;

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

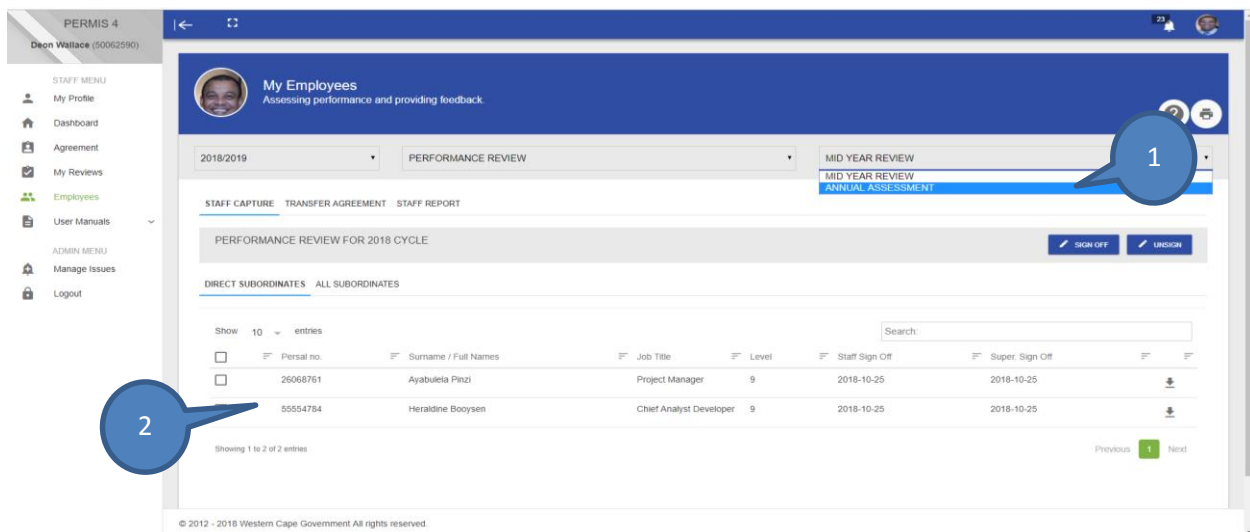
The screenshot shows the PERMIS 4 system interface. The left-hand navigation menu is visible, with the 'Employees' option highlighted. The main content area displays the 'My Employees' page for a supervisor named Deon Wallace. The page shows a dropdown menu for selecting a review type, with 'PERFORMANCE REVIEW' selected. Below this, there is a table of direct subordinates. The table has columns for Personal no., Surname / Full Names, Job Title, Level, Staff Sign Off, and Super. Sign Off. The table contains three entries:

Personal no.	Surname / Full Names	Job Title	Level	Staff Sign Off	Super. Sign Off
55554784	Booyesen, Heraldine	Chief Analyst Developer	9	2018-10-10	2018-10-10
54303320	Mtongana, Bongive Olivia	Project Manager	10	2018-05-04	2018-10-10
26068751	Pintzi, Ayabulela	Project Manager	9	2018-10-05	2018-10-10

The following screen will be displayed after you have selected the Performance Review. On this screen the supervisor needs to;

1. Select the correct Review type/period you want to work on.
2. Select the Employee which you want to assess.

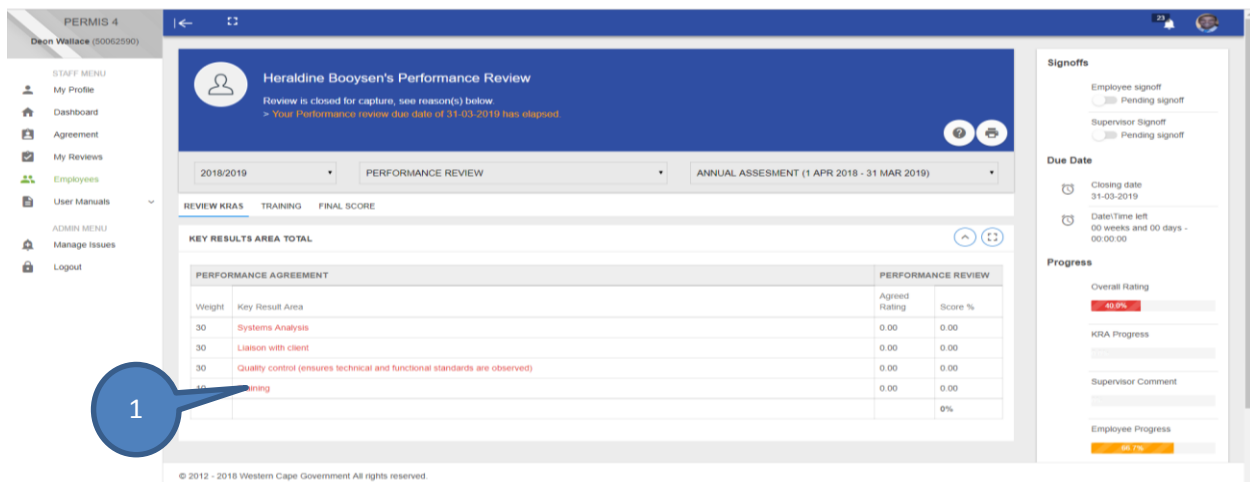




## 2.1. Rating the Key Result Area (KRA)

After you have selected the employee you would like to review the screen below 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;

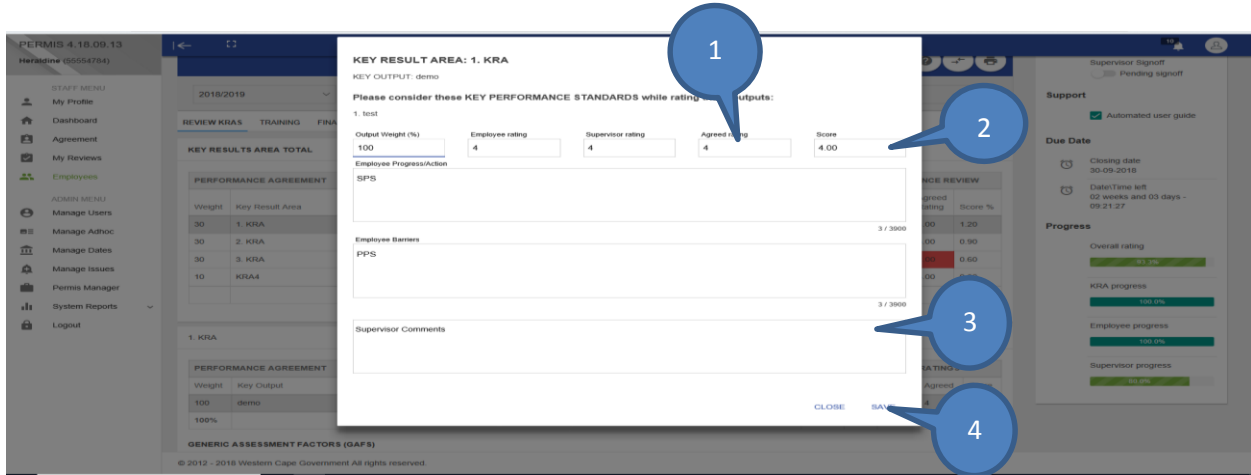
1. **Select a KRA** by clicking anywhere in the KRA line
2. Once you have selected the KRA the key output will display as seen below.



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

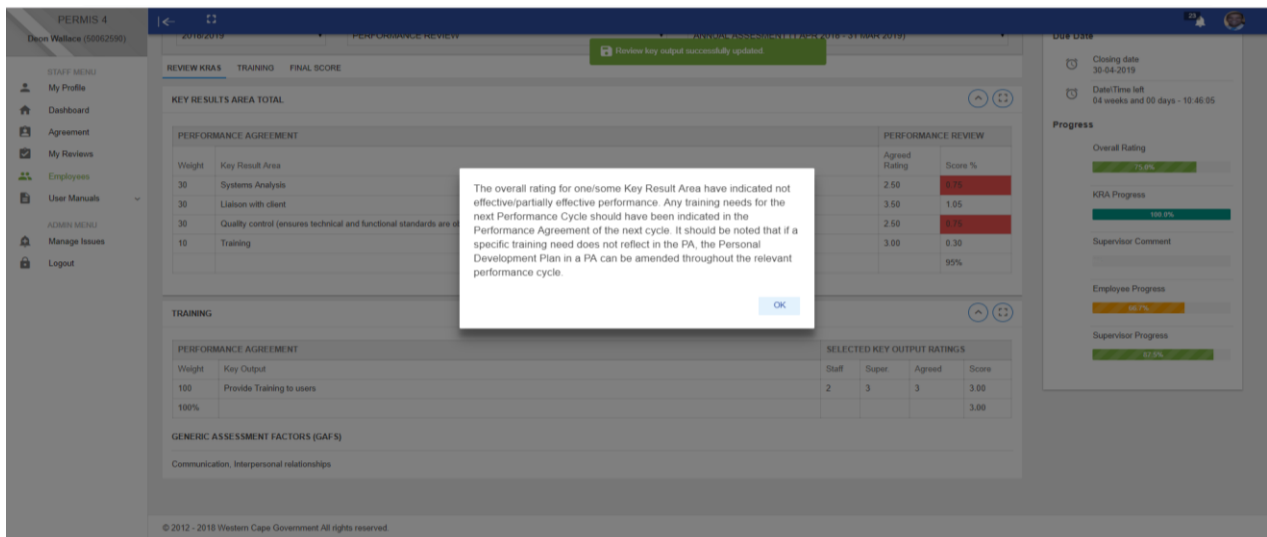
1. Capture the **Supervisor Rating**
2. Capture the **Agreed Rating** (This should ideally happen after the discussion with the employee as per the approved Performance Management Policy.)

3. Capture the **Supervisor Comments** [if the agreed score is a 4, this must be motivated thoroughly].
4. Click on the **Save** button to save information (If an employee has overall KRA Agreed Rating of less than 3 that rating will be highlighted in red, meaning that the employee requires development on that KRA).



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

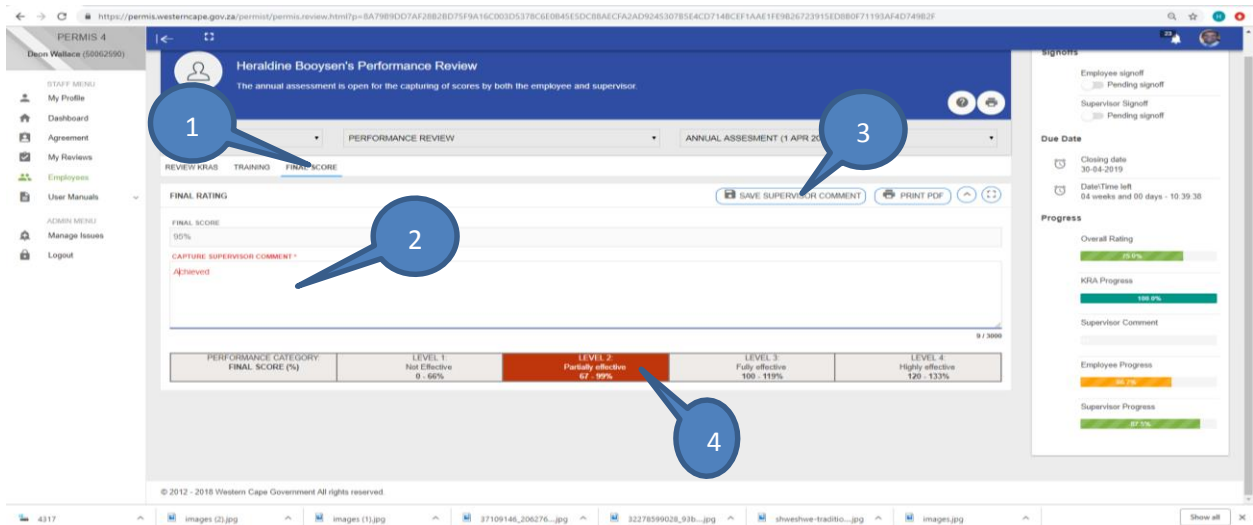
5. The below screen will display if a user has a rating of less than 3 in the Annual Assessment. This popup will guide the user on the next action in term of a process that must be followed.



## 2.2. Capture Final Supervisor Comment

After all the above has been completed the supervisor must capture his/her final comments under the tab Final Score.

1. Select final Score
2. Capture Supervisor comments
3. Save Supervisor comments
4. After the supervisor has assessed the subordinate, the employee's the level of performance will be highlighted based on the percentage achieved.

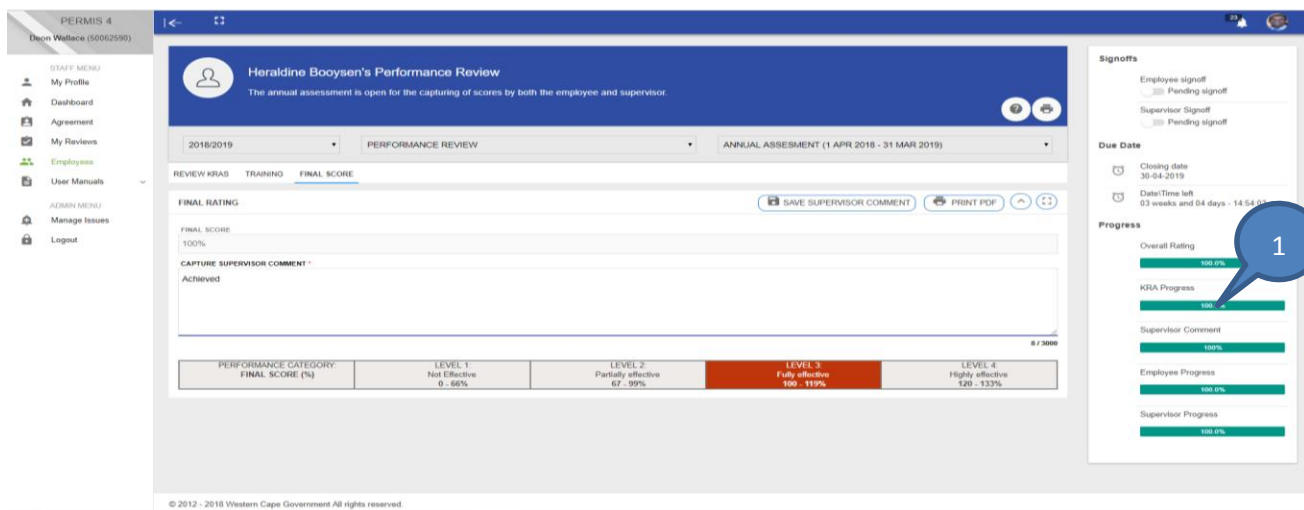


## 2.3. Sign off

After all the areas have been completed and all the progress bars on the right-hand side are of the screen green and at 100%, the supervisor should inform the subordinate who will then be required to sign off before the supervisor can sign off.

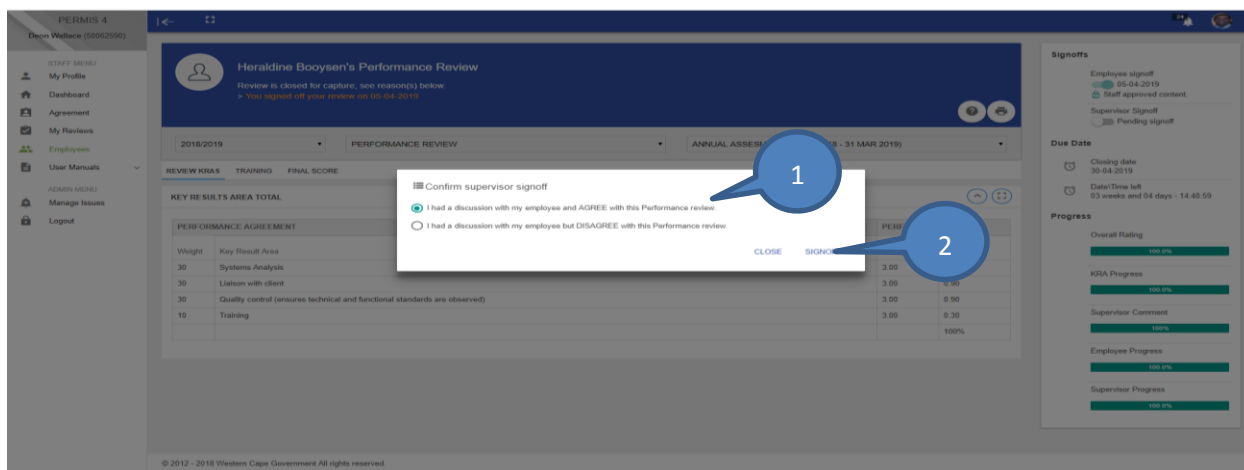
After the user/subordinate has signed off, the system will send notification to the supervisor to inform him/her that the subordinate has signed of his/her Annual Assessment, after which he supervisor can sign off the Annual Assessment.

Please note the system will not allow for sign off, if all areas of the Annual Assessment were not completed.



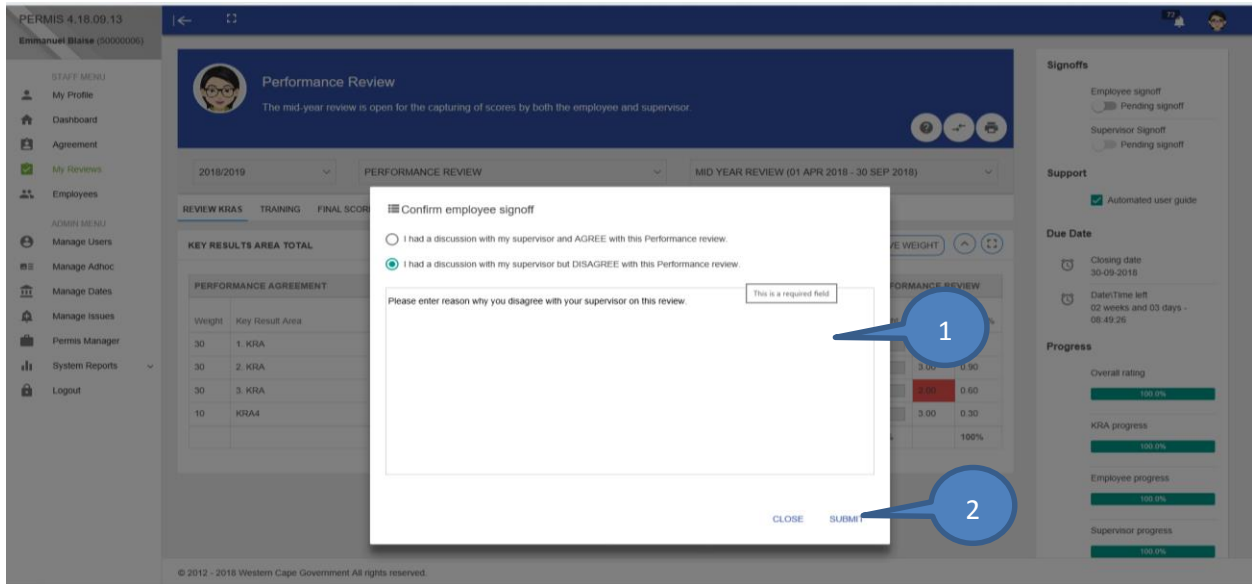
The supervisor will be required to sign off after the subordinate has signed off, please see the below screen and the following steps;

1. Sign off the Annual Assessment by scrolling the **Supervisor Signoff** to the right.
2. Select one of the options as displayed below. If you **Agree** than you can **Signoff**.



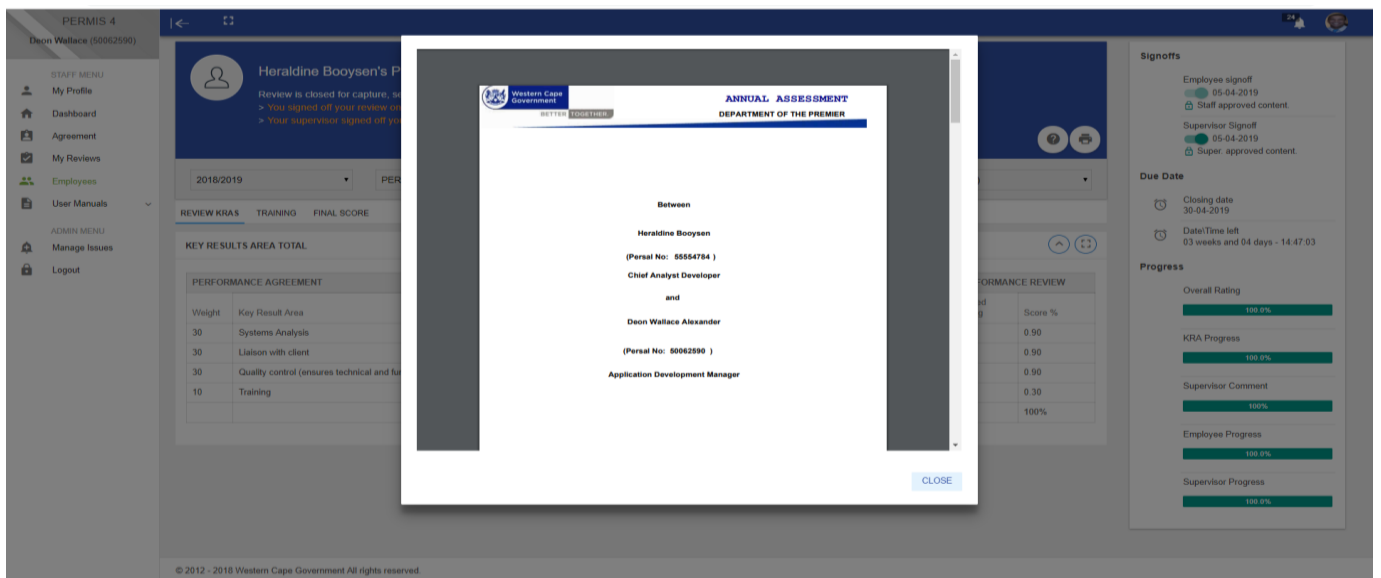
If you have selected the disagree option, you will be required to complete below screen.

1. Capture the **Reason why you Disagree** in the text area below.
2. Then **Submit**



### 3. Print PDF

Once the Review has been completed and signed off by both employee and supervisor you can print a report. Please note the system allows both supervisor and subordinate to print a PDF report of all the information captured on the system. If an Annual Assessment is not complete you will still be allowed to print but the print-out will have draft watermarks on it. The draft watermark will be removed automatically once all the areas on the Annual assessment was completed. Please note that no document will be accepted by the Performance and Priority Unit if in draft format.



#### 4. Additional information

On the right-hand side, you can see your timeline, which is an audit trail of all activities on the system. For example, any changes made to the Performance Agreement, Mid-Year review or Annual Assessment.

**PERMIS 4**  
Deon Wallace (50062590)

**STAFF MENU**

- My Profile
- Dashboard
- Agreement
- My Reviews
- Employees
- User Manuals

**ADMIN MENU**

- Manage Issues
- Logout

**User Profile**  
View PERSAL data, Issue management, User rights and privilege, Permis history and more.

**PERSAL DETAILS** | ISSUE MANAGEMENT | USER PRIVILEGE | NOTIFICATIONS

**Employee Details** [CONTACT DETAILS](#) [CHANGE PICTURE](#)

PERSAL Number 50062590		Surname ALEXANDER	
Firstname DEON WALLACE		Initial DW	
Gender Male	Race	Date of Birth 26-APR-67	Disability No
Home Language	Salary Level 12	Department DEPARTMENT OF THE PREMIER	Component ECONOMIC GOVERNANCE AND ADMINISTRATION
Job Title APPLICATION DEVELOPMENT MANAGER	Rank INFO TECH + REL SR12	Nature of Appointment FIXED APPOINTMENT OFFICER PERMANENT	Sub Component
Post Job Title APPLICATION DEVELOPMENT MANAGER	Job Class PROFESSIONALS	Contractor No	Probation No
Location CAPE TOWN	OSD Status NO	Acting No	Acting Component
Appointed Number	Appointed date 16-NOV-87	Start Date 16-NOV-87	Seniority

Note: Any personal information displayed within the Permis application is attained from PERSAL, therefore any changes that is required should be lodged with your Human Resources Component.

**Timeline**

Select date to change timeline (history): 2019-04-05

- APR 05, 2019 - 4 MINUTES AGO: You updated your Supervisor Comment for Key Output "Provide Training to users" for Employee HERALDINE BOOYSEN (55554784) to "Achieved".
- APR 05, 2019 - 4 MINUTES AGO: You updated your Agreed Rating for Key Output "Provide Training to users" for Employee HERALDINE BOOYSEN (55554784) from 0 to 3.
- APR 05, 2019 - 4 MINUTES AGO: You updated your Agreed Rating for Key Output "Provide Training to users" for Employee HERALDINE BOOYSEN (55554784) from 0 to 3.
- APR 05, 2019 - 4 MINUTES AGO: You updated your Supervisor Comment for Key Output "Prepares system documentation including training manuals and Test cases" for Employee HERALDINE BOOYSEN (55554784) from 0 to 3.
- APR 05, 2019 - 4 MINUTES AGO: You updated your Supervisor Comment for Key Output "Prepares system documentation including training

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