User Guide

Performance Agreement

Salary levels 1 - 12

Compiled by:

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

CORPORATE SERVICES CENTRE

DEPARTMENT OF THE PREMIER

Version 4

Table of Contents

Introduction

According to the Determination and Directive on the Performance Management and Development System of employees other than members of the senior management service as issued in terms of sections 3(1), 3(2) and 41(3) of the Public Service Act, 1994 read together with the Public Service Regulations (2016), 71 and 72 and will be effective from 1 April 2018.

Regulation 72(2)

- Employees shall conclude PA on or before 31 May of each financial year – Regulation 72 (1)
- Opening of PERMIS 4 to commence with PA for the 2018/2019 performance cycle – 1 March 2018
- Signing off of PA on PERMIS 4 by both the employee and supervisor - 30 April 2018
- Newly appointed employees shall conclude, sign and file a PA within three (3) months of the date of appointment – Regulation 72 (2)
- Employees appointed, seconded or transferred to another post or position at the same salary level must enter into a new PA for the new position within three (3) calendar months. – Regulation 72 (2)
- Seconded employees: Copy of the signed PA must be submitted by the seconding Department to the releasing Department within thirty (30) days. – Regulation 72 (2)
- Employees who do not comply with the above requirements, shall not qualify for any performance rewards, i.e. Pay Progression and Performance Bonus – Regulation 72 (7)
- Employees acting in higher positions shall be assessed at the level of his/her post that he/she occupied at the time prior to the acting position.
- Employees are discouraged from amending a PA in the last quarter of a performance cycle (1 January – 31 March).

- PAs should only be amended if there are significant changes to the content of the job of the employee.
- Where an amendment/s is justified, the amended PA must be accompanied by a written motivation explaining the reasons for the changes:
  - Motivation must be signed by the supervisor; and Head of the component;
  - Submitted to CSC – Performance Management who will clarify matters of performance during annual assessments and moderation.

Key Changes

Key Result Areas (KRAs)

- Describes the core functions or broad area of responsibility of an employee. It is broken down into a number of outputs and activities.
- The weighting of all the KRAs should aggregate to 100%.
- The weight of each KRA shall not be less than 10% and shall not exceed 30%.
- KRA's should be weighted as a percentage (%) according to the level of importance and impact it has in the employee's job to indicate how performance will be measured.

Generic Assessment Factors (GAFs) - NEW

- GAFs describe the competency requirements taking into consideration the knowledge, skills and attributes relevant to the employees work. (e.g. Job Knowledge, Acceptance of Responsibility, Communication)

Performance Standards - NEW

- Describes the assessment criteria that employees will be assessed against. (it is based on the job and not the person. Must be specific, achievable, agreed upon)

Employee Screen

Sign in to PERMIS V4 with PERMIS V3 account details	
	Test Steps 1. Enter your PERSAL number in the **Username** field 2. Enter your PERMISv3 password or machine password in the **Password** field 3. After you have captured your username and password click on **SIGN IN**.

Create a new PERMIS v4 Account	
	Test Steps 1. Type in your PERSAL **number** 2. Type in your WCG **email address** 3. Type in your work **telephone number** 4. Type in **password** for your new account. 5. *(Your password should consist of a combination of capital and lower case letters as well as numbers)* 6. **Re-type the password** 7. Click on the **CREATE ACCOUNT** button to create you Performance Agreement account
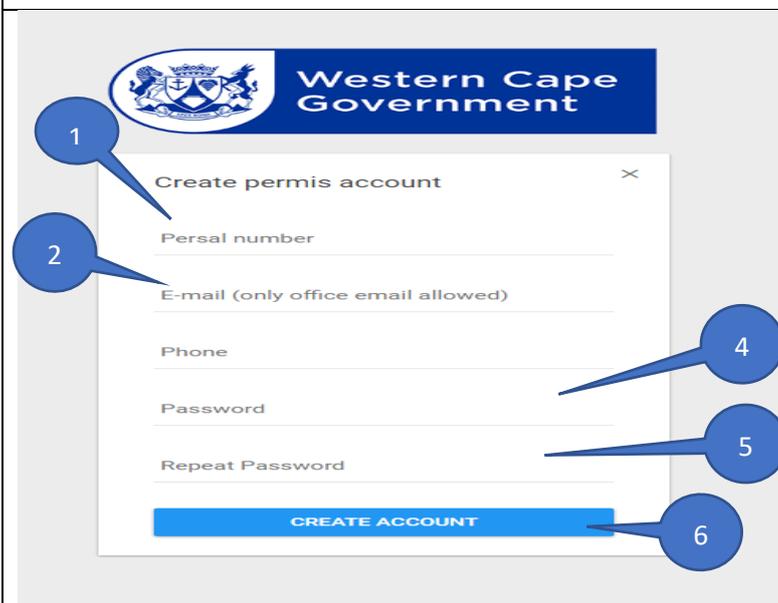
Reset your PERMIS password
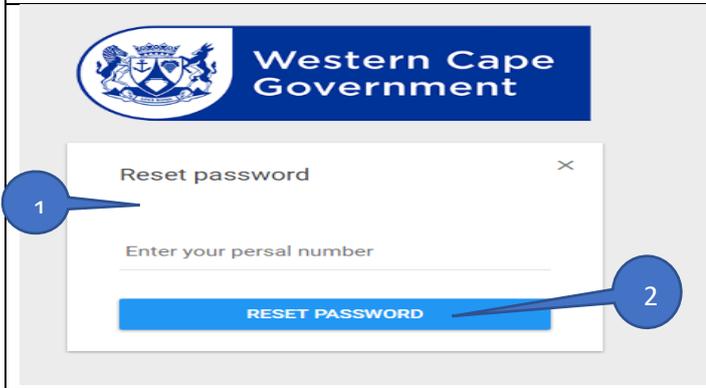
Test steps
1. Type in your PERSAL **number**
2. Click on the **RESET PASSWORD** button

Create a new Performance Agreement
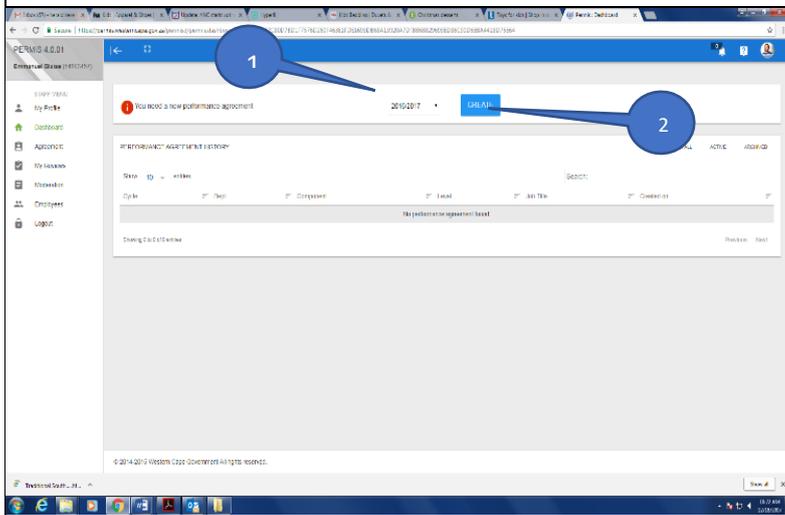
Test Steps

Note: All employees must create a new PA due to changes brought about through the **DETERMINATION AND DIRECTIVE ON THE PERFORMANCE MANAGEMENT AND DEVELOPMENT SYSTEM OF EMPLOYEES <u>OTHER THAN</u> MEMBERS OF THE SENIOR MANAGEMENT SERVICE.**

1. Select the relevant performance cycle period from the dropdown list
2. Click on the **CREATE** button to create a new Performance Agreement for the relevant performance cycle year.

Create a new Performance Agreement: Select Supervisor
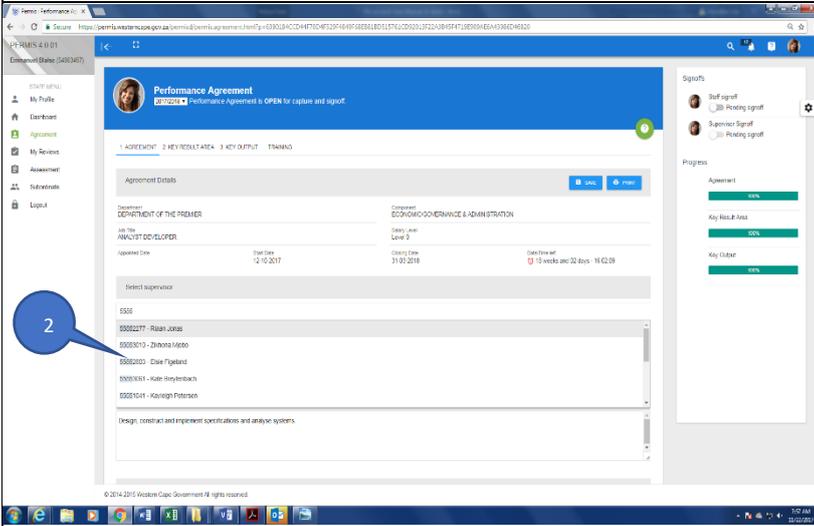
Test steps

1. Type in your Supervisor's name or PERSAL number
2. Select your supervisor from the drop-down list.

Note: In the event that one has more than one supervisor, step 1 and 2 can be repeated.

Create a new Performance Agreement: Capture Job Purpose and Job Function
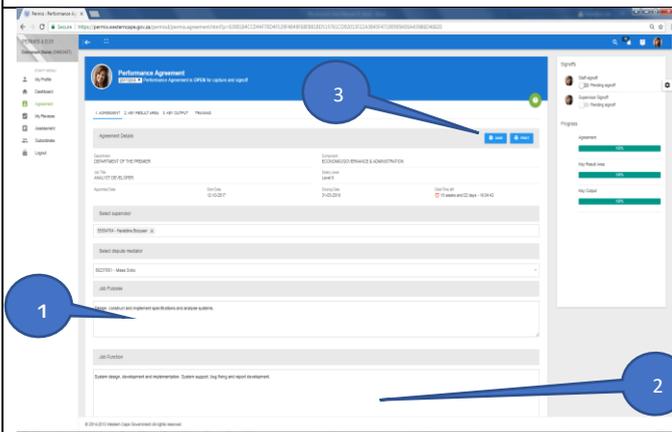
Test Steps

1. Capture your **Job Purpose** details
2. Capture your **Job Function** details
3. Click **Save**, once all required fields on this screen has been completed,

Navigate to the KRA capture screen
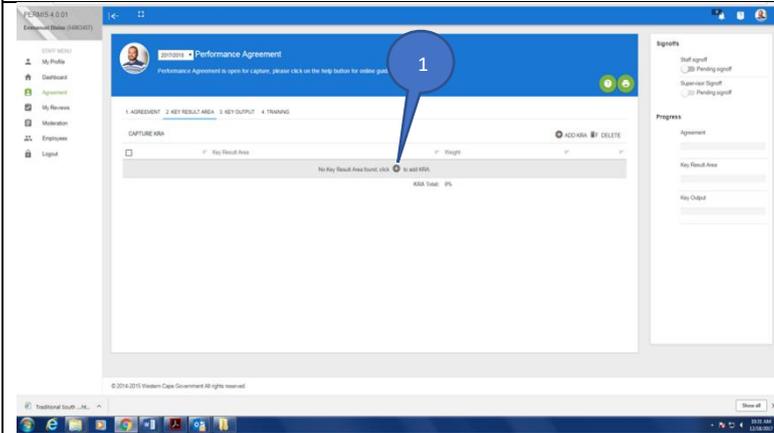
Test Steps

1. Click on **Add KRA** or the "**+**" icon to add KRAs

Capture Key Result Area(KRA)
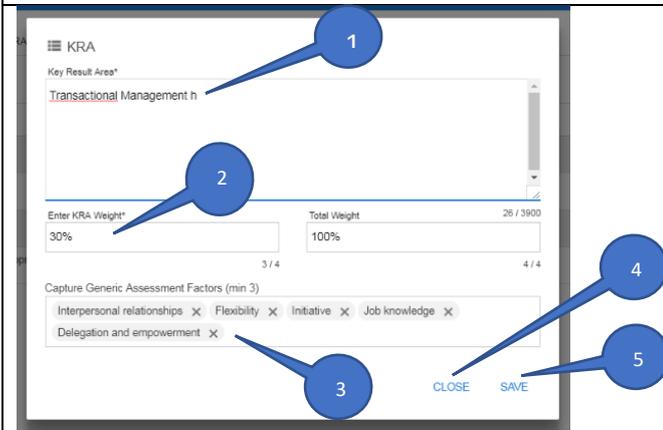
Test Steps

1. Capture your **Key Result Area**
2. Capture a **weight** for the KRA weight *(weight must be between 10% and 30 %).*
3. Select relevant **Generic Assessment Factors** from the drop-down list
4. To close the screen without saving the information click on "**Close**"
5. To save the Key Output information click "**Save**".

Delete Key Result Area

Key Result Area Main Screen
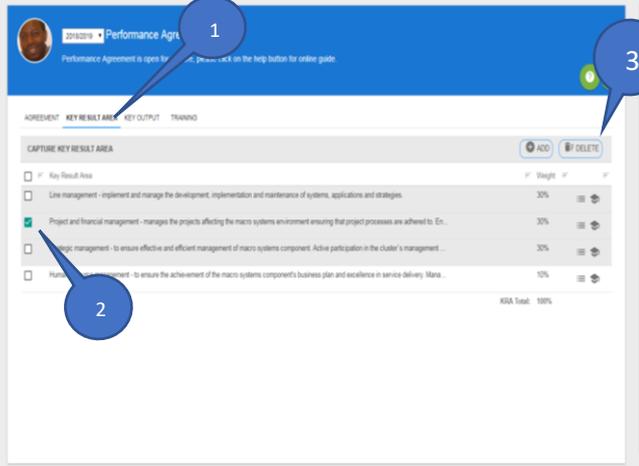
Test Steps

1. Select the **Key Result Area** Tab
2. Select the Key Output that you want to delete
3. Click on the **Delete** icon

Navigate to Key Output Capture Screen

Key Output Main Scree
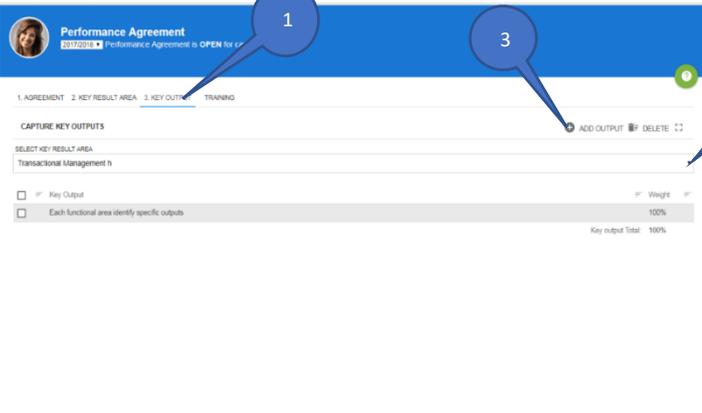
Test Steps

Note: please note that PERMIS V4 has a logic flow which navigates you from one screen to the other, but in the event that you need to go back to a category (such as; **Key Outputs**) you can follow steps 1-3:

1 Select the **Key Output** Tab
2 Select the KRA from the drop-down list
3 Click on **Add Key** Output to get to the capture screen

Capture Key Output

Test Steps

1. Capture the **Key Output** details
2. Allocate a **weight** to the Key Output by typing in a value between 1 and 100
3. Capture the **resources** allocated to the Key Output
4. Capture your **Performance Standards**
5. Click on the "**+**" sign to add additional Performance Standards
6. Select the timeframe for the output by
   a. clicking on the drop-down menu or
   b. selecting a date on the calendar
7. To close the screen without saving the information click "**Close**"
8. To save the Key Output information click "**Save**"

Delete Key Output

Key Output Main Screen

Test Steps

4. Select the **Key Output** Tab
5. Select the Key Output that you want to delete
6. Click on the **Delete** icon

Navigate to the training needs screen

Training- Main Screen
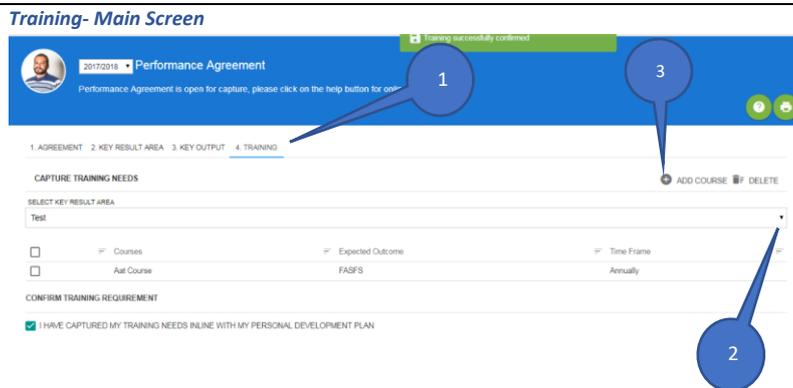
Test Steps

Note:

Note: please note that PERMIS V4 has a logic flow which navigates you from one screen to the next, but in the event that you need to go back to a specific category (such as; **Agreement, Key Result Area, Key Outputs** and **Training**) you can follow these steps:

1. Select the Training tab
2. Select the relevant KRA from the drop-down list
3. Click on "Add course" - a new screen will be displayed where one can capture course details.

Capture training needs

Test Steps

1. Select the training programme:
    a. By searching for a course- type (the name of the course) in the text box.
    b. To select the course, click on the dropdown menu.
2. Type in the **Expected Outcome** of the selected training programme.
3. Click on the dropdown menu and choose a time frame for the training programme.
4. To close the screen without saving the information click "**Close**"
5. To save the Training programme information click "**Save**"

Western Cape Government
BETTER TOGETHER.

Delete a training need.
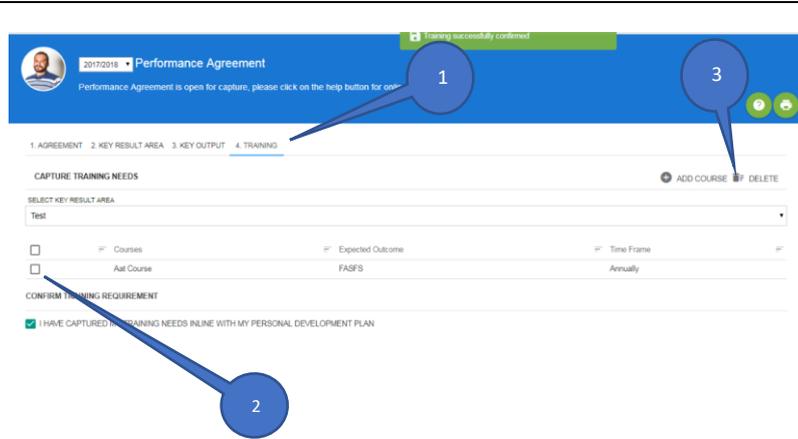
Test Steps

1. Click on the Training tab
2. Select the training need(course) that you want to delete.
3. Click on the Delete icon to delete a course.

Sign-Off Performance Agreement
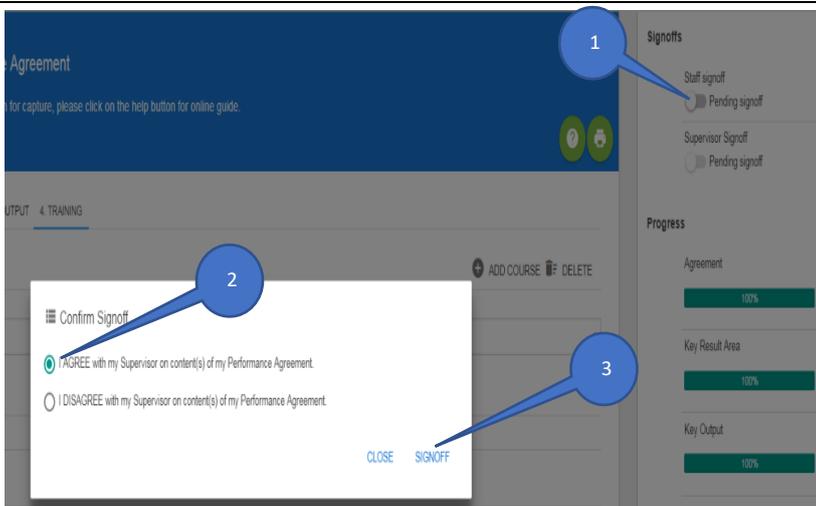
Test Steps

1. Move the slider to the right
2. Select the "**I Agree**" option
3. Click on **SIGN-OFF**

Sign-Off Performance Agreement
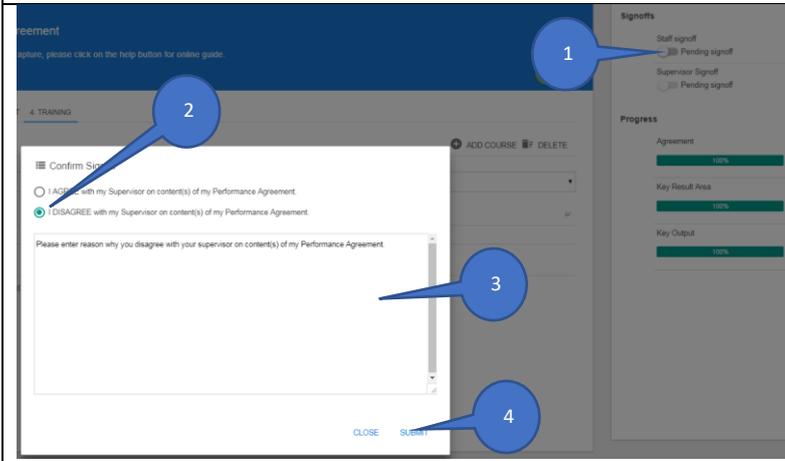
Test Steps

1. Move the slider to the right
2. Select the "**I Disagree**" option
3. Provide a reason for disagreeing with your supervisor.
4. Click on **SUBMIT**

View Performance Agreement PDF Document
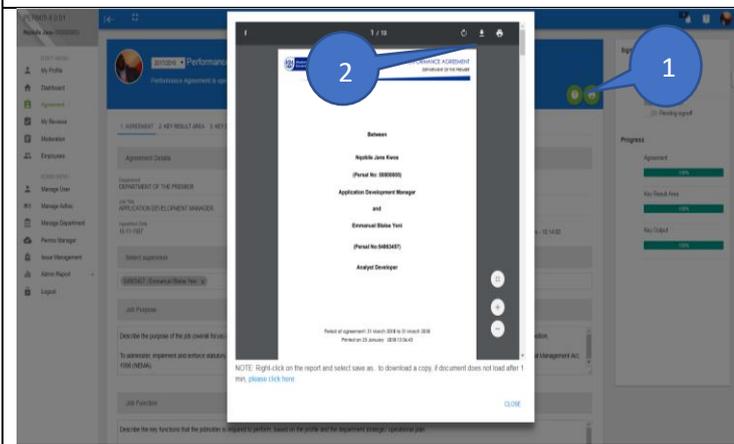
Test Steps

1. Click on the **Print icon**. The PA in PDF format will appear on the screen or window. This will reflect the content of your PA.
2. You can now download or print your PA as a hardcopy by selecting the relevant icon.

Supervisor Screens

Transfer staff Performance Agreement from one staff member to another
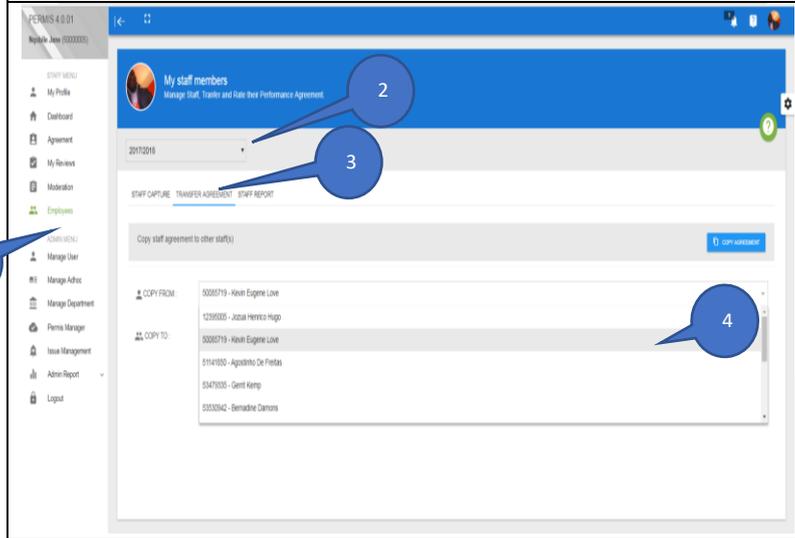
Test Steps

1. Click on the "Employees" button
2. Select cycle date from the dropdown menu, your subordinates will appear below
3. Click TRANSFER AGREEMENT
4. Select employee you want to transfer the PA from
   Click "Transfer PA" button [then the PA of employee on the dropdown menu will be copied to employee whose name appears in text field]

Sign off Staff PA
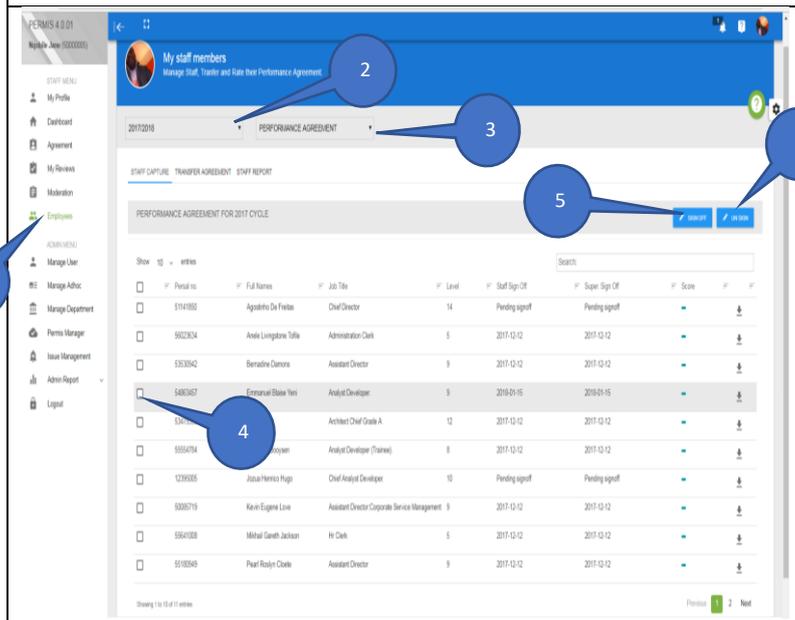
Test Steps

1. Select Employee on the right menu bar
2. Select the correct performance cycle
3. Select Performance Agreement
4. Select the Performance Agreement of the subordinate or subordinates, that you wish to sign off.
5. Click on **signoff** to sign off their Performance Agreement.
6. Supervisor can also un-sign Performance Agreements by selecting the subordinate as described in the previous step and click on un-sign