

# **User Guide**

# **Performance Agreement**

# Salary levels 1 - 12

Compiled by:

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- Directorate Economic Governance and Administration

CORPORATE SERVICES CENTRE DEPARTMENT OF THE PREMIER





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### 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				
2 <b>Western Cape</b> Covernment PERMIS Performance Management Information System Username Password 2 SIGN IN Reset password Need help?	<ul> <li>Test Steps</li> <li>1. Enter your PERSAL number in the Username field</li> <li>2. Enter your PERMISv3 password or machine password in the Password field</li> <li>3. After you have captured your username and password click on SIGN IN.</li> </ul>			

Create a new PERMIS v4 Account	
2 Western Cape Government 1 Create permis account Persal number E-mail (only office email allowed) Phone Phone Password Repeat Password CREATE ACCOUNT 6	<ol> <li>Test Steps         <ol> <li>Type in your PERSAL number</li> <li>Type in your WCG email address</li> <li>Type in your work telephone number</li> <li>Type in password for your new account.</li> <li>(Your password should consist of a combination of capital and lower case letters as well as numbers)</li> <li>Re-type the password</li> <li>Click on the CREATE ACCOUNT button to create you Performance Agreement account</li> </ol> </li> </ol>



#### Reset your PERMIS password

Western Cape Government	Test steps1. Type in your PERSAL number2. Click on the RESET PASSWORD button
Reset password ×	
Enter your persal number	
RESET PASSWORD	2

#### Create a new Performance Agreement **Test Steps** 0 🖢 PERMIS 4.0.01 🥦 🛛 🗶 Note: All employees must create a new PA STAFF VEN due to changes brought about through the 2010/2017 0 Ingresse Ingresse Aprice Aprice Nor leaves Nor leaves Criptopees Logout **DETERMINATION AND DIRECTIVE ON THE** PERFO PERFORMANCE MANAGEMENT AND Stra 10 **DEVELOPMENT SYSTEM OF EMPLOYEES OTHER** THAN 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. 📀 é 📜 D 🚺 🕫 🗷 😨 🚺 10-22 AM



#### Create a new Performance Agreement: Select Supervisor

S Pemis : Performance Ac: X ← → C Secure https://pr	erniswesternape.gov.za/pomio@pomis.agreement.htm	mPp=6390184CCD44F76C4F529F4849F68E881	BD515761CD92013F22A3B45F4719E909AE6A43986	D46820	4 <b>- 6</b> + 1	Test steps
C C C Court Heading     Physics 400 (2400057)     Control Marker (2400057)     Control Marker     My Fulde     My Fulde     My Fulde     My Fulde     My Rocens     My Rocens     My Rocens     Lopol	C     C	nty na zavanský na vyde skole konstant M na k OPEN for capture and spycet Pyř. T TREMIS	Source and a source of the sou	(HAZ)	CL &	<ol> <li>Type in your Supervisor's name or PERSAL number</li> <li>Select your supervisor from the drop- down list.</li> </ol>
	And and a construction And and a construction Sector Sector Sec	Interior 1 to Soft	au-s- Compose 3:132210	lantona i Hands ac 2 Apo-11 € 3	60 (hter ■ 99 + 10 ≤ 10 € 10000	Note: In the event that one has more than one supervisor, step 1 and 2 can be repeated.

Create a new Performance Agreemen	t: Capture Job Purpos	se and Job Function
Image: Section of the section of t	Charlense Color	<ol> <li>Test Steps</li> <li>Capture your Job Purpose details</li> <li>Capture your Job Function details</li> <li>Click Save, once all required fields on this screen has been completed,</li> </ol>



Navigate t	to the KRA captu	re screen		
CORECTON CONTROL OF CO	Integrit • Performance Agreement Protocol - Sector - Sec		Pagent Markand Dennes light Dennes light De	Test Steps 1. Click on Add KRA or the "+" icon to add KRAs
C 2014/2019 Vielen	no Capa Guarmad di ujuta suored.		X • № 10 € 100.000	





#### Delete Key Result Area

y Result Area Main Screen		Test Steps
20122191 Performance Apr. 1 Performance Agreement is specific and the help batter to rolline guide	3	<ol> <li>Select the Key Result Area Tab</li> <li>Select the Key Output that you want to delete</li> </ol>
CAPTURE NEY RESULT AREA	ACO BI DELETE	3. Click on the <b>Delete</b> icon
🗌 🖙 Key Result Ana	F Weight F F	
Line management - implement and manage the development, implementation and maintenance of systems, applications and strategies.	<sup>326</sup> = \$	
Project and financial management - manages the projects affecting the macro systems environment ensuing that project processes are adhered to. En	<sup>305</sup> = \$	
top: management - to ensure effective and efficient management of macro systems component. Active participation in the cluster's management	305 = \$	
Hund recomment - be ensure the achievement of the macro systems component's business plan and escellence in service delivery. Mana	105 = 🗢	
2	NGA hout 1995	

#### Navigate to Key Output Capture Screen Key Output Main Scree **Test Steps** Note: please note that PERMIS V4 has a logic Ø P flow which navigates you from one screen to the other, but in the event that you need to go CAPTURE KEY OUTPUTS back to a category (such as; Key Outputs) you LECT KEY RESULT AREA can follow steps 1-3: F Key Output Each functional 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



Delete Key Output		
Key Output Main Screen	CO CUTURE IN DELETE : Wages IN Ky calput Text: 1995	<ul> <li><b>Test Steps</b></li> <li>4. Select the Key Output Tab</li> <li>5. Select the Key Output that you want to delete</li> <li>6. Click on the Delete icon</li> </ul>



#### Navigate to the training needs screen

Training- Main Screen	Test Stene
a Insuing successfully confirmed	lest steps
20172018 • Performance Agreement	Note:
Performance Agreement is open for capture, please click on the help button for cost	• Note: please note that PERMIS V4 has a logic
1. AGREEMENT 2. KEY REBULT AREA 3. KEY OUTPUT 4. TRAINING	flow which navigates you from one screen to
CAPTURE TRAINING NEEDS	the next, but in the event that you need to go
SELECT KEY HESUAT AREA Test	back to a specific category (such as;
F Courses     F Expected Outcome     F Time Frame     And Course     Form     F	Agreement, Key Result Area, Key Outputs and
CONFIRM TRAINING REQUIREMENT	<b>Training</b> ) you can follow these steps:
V I HAVE CAPTURED BY TRAINING NEEDS INLINE WITH MY PERSONAL DEVELOPMENT PLAN	1. Select the Training tab
2	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
I Training Need	1. Select the training programme:
Select Training Course 1b	a. By searching for a course-type (the
Search training provider, department, niche, courses	name of the course) in the text box.
Expected Outcome	b. To select the course, click on the
2	dropdown menu.
	2. Type in the Expected Outcome of the
Time Frame*	selected training programme.
Daily	3. Click on the dropdown menu and choose
CLOSE SAVE	a time frame for the training programme.
2	4. To close the screen without saving the
	information click "Close"
2	5. To save the Training programme
	information click " <b>Save</b> "



Delete a training need.

Traing saccessibly confirmed		Test Steps
20172018 • Performance Agreement	3	1. Click on the Training tab
Performance Agreement is open for capture, please click on the help button for on		2. Select the training need(course) that you
1.AGREEMENT 2.KEYREBULTAREA 3.KEYQUTPUT 4.TRAININO		want to delete.
CAPTURE TRAINING NEEDS	ADD COURSE	3. Click on the Delete icon to delete a
SELECT KEY KESAT AREA Test	٠	course.
F Courses     F Expected Outcome     F Time Fit	ame =	
Aut Course FASFS Annually	у	





#### Sign-Off Performance Agreement







### Supervisor Screens

Transfer staff Performance Agreement from one staff member to another									
Constant     Constant	<ol> <li>Test Steps</li> <li>Click on the "Employees" button</li> <li>Select cycle date from the dropdown menu, your subordinates will appear below</li> <li>Click TRANSFER AGREEMENT</li> <li>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]</li> </ol>								

Sign o	Sign off Staff PA												
PERUS 54.001 Nature See 3000000 INVERSE INFORM INF	Image: Second	Re Date their Performance Agreent PERFORMANCE AD AT STAFF REPORT OR 2017 CYCLE ** Fol Names Agreent Da Frates Agreent Da Frates Andre Lingstom Talle Bernative Dances Exercised Dances Company Agreent Dances Company Agreent Dances Company Agreent Dances Company Agreent Dances Company Co	ene 2 REDENT P Job Ten Dref Drestor Advansatori Drestor Analget Devidger Analget Devidger Analget Devidger Analget Devidger Analget Devidger He Denk Analget Devidger He Denk Analget Devidger He Denk	2 3	5 5 8 8 8 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9	ach * Sope Sp CF Perlig spaff 2010 Q 2010	*         *         *           *         *         *	2 Ine	<b>T</b> ( 1. 2. 6 4. 5. 6.	Select Employee on the right menu bar Select the correct performance cycle Select Performance Agreement Select the Performance Agreement of the subordinate or subordinates, that you wish to sign off. Click on <b>signoff</b> to sign off their Performance Agreement. Supervisor can also un-sign Performance Agreements by selecting the subordinate as described in the previous step and click on un-sign			