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HEAD'S GUIDE

ASSESSMENT MODE

FOR ALL PARTICIPANTS

1. Be very specific when entering comments

When you decide to evaluate someone with the **highest or the lowest assessment, you must give a precise description of**, what does your assessment concern, what was the **result** achieved and **benefit or damage** caused. Flat-rate expression of satisfaction or dissatisfaction is not sufficient. **(For each question there will be additional explanations, as assistance, to understand the question properly, which will appear when placing cursor on the question.)**

2. Keep entering data into the program during the whole month

Bonus Plus should serve you as a **note**, in which you should **regularly and more times per month** write various important events relating to any person who is assigned to you for evaluation.

How to access notebook: Open program Bonus Plus and select »NOTE« in the toolbar. After writing the comment, select user which the comment is related to and confirm by clicking »CONFIRM«.

3. At the end of the month form an assessment based on these notes

Evaluations will be easier and more efficient if preparing assessments **by scanning notes** that have been entered over an entire month for each individual. If having an estimate for assessment **0 or 7**, enter a comment. Notes written over the month will be particularly helpful because at the end of the month you might no longer remember what happened at the start.

4. Expressing proposals for improvements

Each employee is required to give on a monthly basis, **at least one written suggestion for improvement** of any potential savings in the workplace. **Suggestions, which shall besides description include specific solutions as well**, submit upon agreement. (Management will prepare more specific instruction how suggestions should be prepared and archived).

5. Clarifying ambiguities in comments

It is the task of each user **to clarify any ambiguous comment as soon it arises**, regardless from whom it comes, as such comments often are result of unclear criteria, inadequate instructions or vagueness of the relationship.

When having discussions with colleague, who wrote such a comment, you should **in detail clarify** its content, and to agree **how each of you should act in the future**. In case the other side does not want to cooperate, inform your supervisor about this (or supervisor above this person in case matter is related to your manager) and note this in program Bonus Plus under monthly comments.

You are obliged to ensure that the same comments will not be repeated, since this means that, you don't want to clarify the problem or continue with such behaviour despite warning and clarification.

ASSESSMENT MODE

FOR MANAGERS

6. Enter important information/events as soon as they happen

Regularly recording various events associated with employees is a duty of managers, especially the positive contribution of each and discovering any misadministration. In addition to these events, they are required to record a summary of major discussions or arrangements with subordinates, and their promises to improve behaviour. In addition to the evaluations, executives expect from each manager **at least some additional entries on a monthly basis**.

7. The method of assessing the fifth question; “Suggestions for improvements”

In case you receive only an oral suggestion for improvement, ask to write this suggestion with a brief description and possible solutions, else you will not be able to take this into consideration. In case you, by the end of the month don't receive a copy of proposal for improvement, you should assess that person with 0.

Positive assessments should only be given for those suggestions, which will be stored in archives. Higher scores can also be used in cases when a person, in a given month made a number of concrete proposals (in writing). It is probably not necessary to highlight, that proposals of your subordinates should not be used as your own proposal.

8. Consider reality when assessing

Managers should achieve while giving assessments the recommended ratio of negative (30%) and positive (70%) assessments. 30% refers to the sum of all the lower ratings (0 or 2), 70% refers to the sum of all higher ratings (4 or 7).

BENEFITS: To Employees, after the implementations of Program “HRM review - Bonus Plus”

By introducing program “HRM review - Bonus Plus”, the inter-working relations will improve and so the atmosphere in the company. Program reflects the effort of each employee and shows whose contribution means the most. Therefore, such an evaluation is one of the best ways to increase efficiency, to assure security of your job, the possibility for higher salaries and additional stimulations.

What you gain:

- **AN IMPARTIAL EVALUATION AND REWARDING**
Since evaluations are 360 degrees, this allows you very correct and equitable remuneration, which means that the simulative part of your income will no longer depend on good relations with your superior only, but will be equally effected by all areas you will be assessed with.
- **A DIRECT INFLUENCE ON YOUR OWN INCOME**
You will have the possibility of a direct impact on the level of your own income; by having good working results and positive inter relation score.
- **A DIRECT INFLUENCE ON INCOME OF YOUR COLLEAGUES AND MANAGER**
Your assessments will directly affect the income of your colleagues and the income of your manager.
- **AN OPPORTUNITY TO STOP INAPPROPRIATE BEHAVIOUR OF INDIVIDUALS**
By evaluation and comments you can effectively stop those individuals who often have a negative effect.
- **AN OPPORTUNITY TO IMPROVE RELATIONS WITH YOUR COLLEAGUES**
Following the comments, which will be recorded in questionnaires by your colleagues, you will have an insight into how others see you, and consequently the possibility of adjusting your attitude towards them.
- **AN OPPROTUNITY TO TELL YOUR COLLEAGUES HOW THEY SHOULD COMMUNICATE OR WORK WITH YOU FOR BETTER RESULTS**
By giving comments you can point out certain unwanted behaviour and what your colleagues could do to improve.
- **A TOOL TO WARN DIRECTOR OF POTENTIAL PROBLEMS WITH YOUR MANAGER**
Problems due to occasional bias, harassments, mobbing...
- **HAVING DIRECT INFLUENCE ON THE OVERALL ATMOSPHERE IN THE COMPANY**
More than ever, you will have with your own contribution an ability to influence a positive mood in your company and higher quality relations.
- **AS ALL POSITIVE CONTRIBUTIONS ARE ARCHIVED YOU CAN COMPETE FOR SPECIAL AWARDS**

You only will spend a few minutes per month for these evaluations!

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USER'S GUIDE

LOG IN

I. Enter password and Change password


I. /1. Enter password

- Go to www.hrm-review.si.
- After the site opens click on the icon  **Login for users**.
- You will come to the »Log In« window where you enter your user name and your password. (You will need to use capital letters for the initials only)
- Then choose your company in the »Company« window.

 **Generate**





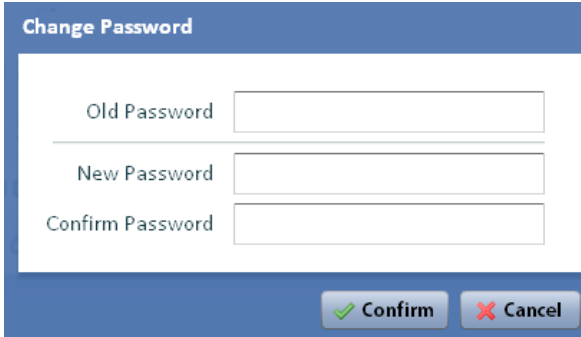
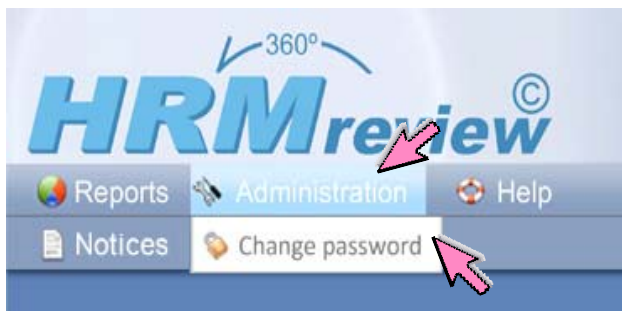
The screenshot shows a 'Log in' window with the following fields: 'User name' containing 'Aleksander', 'Password' containing '*****', 'Company' set to 'IZO d.o.o.', and 'Language' set to 'DEMO d.o.o.'. A dropdown menu is open for the 'Language' field, showing options: 'EGP d.o.o.', 'EUROBOX d.o.o.', 'SAVA TIRES d.o.o.', and 'SEP d.o.o.'. A 'Log in' button with a green checkmark is at the bottom right.

After you do that click on the icon  **Log in**


I. /2. Change password

You can change your password whenever you wish.

Click on the icon  **Administrations** and choose  **Change Password** from the menu.



The screenshot shows a 'Change Password' window with three input fields: 'Old Password', 'New Password', and 'Confirm Password'. At the bottom right are 'Confirm' and 'Cancel' buttons.

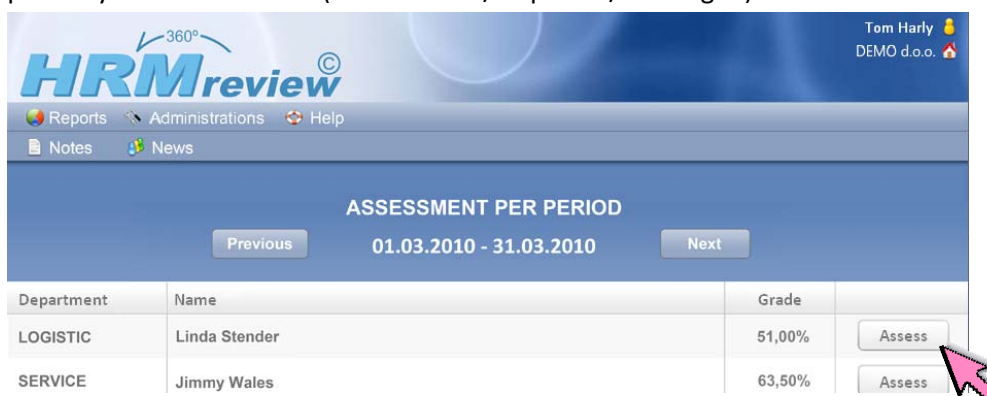
A new window »Change password« will open. First enter the old password, after that the new password and then enter the new password again into the last line. Finally click the icon  **Confirm**


II. Assessment

NOTA BENE: you can enter assessments in any current period including on the last day of the given period. When that period expires the programme will provide the tools for the new period and at the same time disable any possibilities to correct the grades in any previous or processed period.

II. /1. Assessment procedure

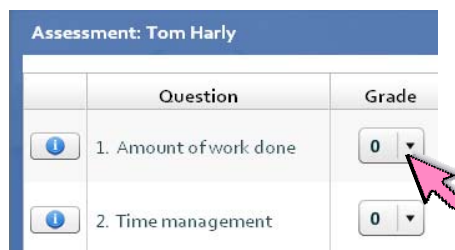
After you enter the password a new window will open showing all persons allocated to you for the assessment. Click the icon »Assess« next to the name of the person you have selected and the programme will automatically provide the appropriate questionnaire according to the status of the person you wish to assess (Subordinate / Superior / Colleague).



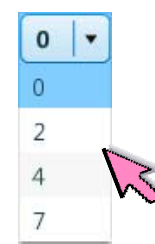
Note: There are two types of questionnaires. The first is intended for the line managers who assess their [Subordinates](#), while the second is intended for the assessment of the [Superiors](#) and [Colleagues](#). The assessment procedure is the same in both questionnaires. Click the icon  before the question you wish to assess. (Picture 1)



Picture 1.




Picture 2.



Picture 3.

A new window will open with the descriptions of grades. Read the descriptions carefully and after you decide on the grade click on the icon »Grade« (picture 2). Another window will open showing the grades 0, 2, 4, 7 (Picture 3). Select a grade and then enter a short comment, if you have one, in the next field called »Comments«.

NOTA BENE: If you select the **highest (7) or the lowest (0) grade, comments are obligatory**. In other cases (grades 2 or 4) the comments are not necessary, however they are preferable)

When the selected person is assessed on all the questions conclude the process by clicking the icon 

Note: The programme will not allow you to conclude the assessment in the following cases:

- a. when you do not grade a question,
- b. when you do not enter a comment with the highest or the lowest grade.

II. /2. Review of the past assessment

In the field »Assessment in the period:« you will find two icons on the left and on the right side respectively. They refer to the »Previous« and »Next« period and enable you to move to previous months and then back again.



Note: the programme does not allow you to correct the data in the expired months.

III. Reports




By clicking »Reports« you will be able to view the assessments and the records. The number of viewings depends on your status.

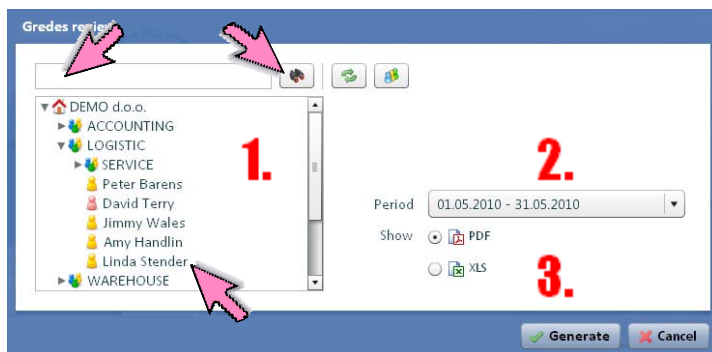




III. /1. Grades Report

Enables you to view the assessment results for a selected person in a specific month.

By clicking the »Grades Report« a new window will open where you can select a person. You can do that in two ways:

- a. write the person's name in the empty field and click , (1.)
- b. choose the person from the list of people and confirm your selection (1.)



When viewing the list you can use the following two icons: icon  will enable you an extended view of all the users, while the icon  will reduce the view to individual departments only.

NOTA BENE: the programme can enable you to view either your personal grades only or grades and comments of other workers as well, depending on the type of the viewing authority you have.

In the window choose one of the periods you wish to view, (2.). At the end choose the format. There are two possibilities:

- a. PDF form (3.)
- b. Excel file with the possibility to change data (3.)

When you have chosen your option click on the icon



That will enable you to view:

- a. »Balanced average« grade, which is the total grade of the superior, colleagues and the subordinate,
- b. »performance percentage« which is the basis on which individuals are placed on the performance ladder,
- c. »percentage of incentive performance« represents the calculated value for the incentive part of the salary,
- d. detailed review of the grades allocated to the individual questions is shown in the remaining document.

III. /2. Performance Report (an insight the assessment results for several selected periods)



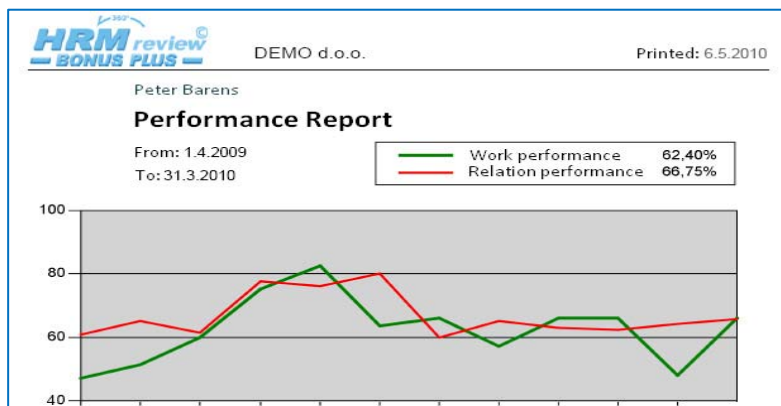
By clicking »Performance Report« a new window will open where, similarly to »Grades review«, you can enter a person's name, a period you wish to view and the format.

When you have chosen your option click on the icon



That will enable you to see:

- a. graphic image of a person's performance within selected number of periods,
 - with reference to their work performance (the green line)
 - with reference to the interpersonal relations performance (the red line)
- b. the calculation of the average performance of this person within the selected periods,




- c. a detailed review of grades allocated to individual questions are shown in the remaining document.

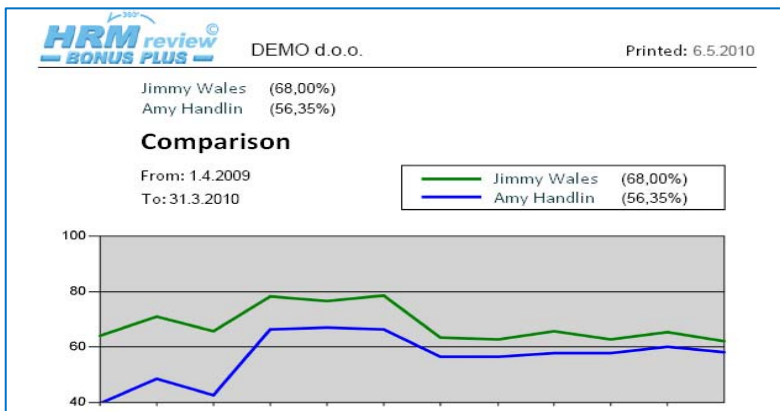
III. /3. Comparison

You will be able to see the performance of two people.



By clicking »[Comparison](#)« a new window will open where you can, in the same way as in the other examples, enter the names of both persons, select a period you wish to check and finally confirm your selection by clicking on the icon 

You will be able to see the graphic image of the performance of both workers in the selected number of periods. Each person is marked with a different colour. The colours and the respective persons are explained in the index square which you will find to the left of the graph. In addition, next to the person's name you will find the calculation of the performance in percents.




A detailed grades review is shown in the remaining document.

III. /4. Comments Overview

An insight into the statistics of assessment and a review of comments)



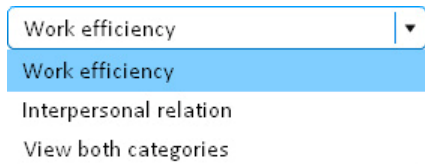
By clicking »[Comments Overview](#)« a window will open where you can enter the names of the persons and select a period you wish to view in the same way as in the previous examples.

In the field where you select a period you will see another field  which will enable you to narrow down the data you wish to view, which means that the programme provides only the grades which are above or below the value that you select.

E.g.: if you set the value on the band to **50**, the programme will provide only those grades which do not exceed this percentage value in the selected period.

If you do not set a value, the programme will provide all the questions in the selected period.

You can also choose to view the questions separately relating to either *work efficiency category* or *interpersonal relations category* or you can view *both categories* together




Open the options in the window »Work efficiency« and select a category. Then choose a format and confirm your selection by clicking 

III. /5. Files

An insight into the positive and negative comments and notes for the selected person)



By clicking “Files” a window will open where you can enter the names of the persons and select a period you wish to view in the same way as in the previous examples. After you select your option click on the icon 

You will be able to view:

- a. all positive comments referring to the selected person,
- b. all negative comments,
- c. all notes and annotations.

III. /6. Individual's goals

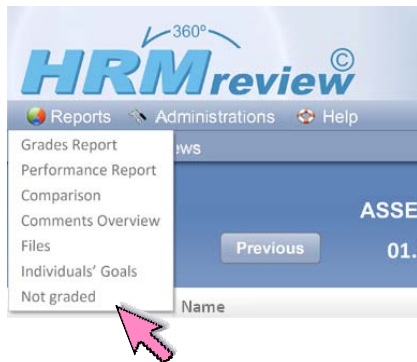



By clicking »Individual's goals« a window will open where you can view the set goals and performance criteria at any time, provided the goals were discussed with the line manager and then noted down.

Note: this document does not allow any corrections or adding any new goals. This is the responsibility of your line manager, who has the authorisation to process your goals,

III. /7. Not graded

Enables the review of all people who were not assessed in individual months).



By clicking on the icon “Not graded” a window will open where you can select the period you wish to view and choose the format. Then confirm your selection by clicking 

IV. Administration



The »Administration« menu will enable you to change the password only, unless there is a different agreement.

To change the password see the instructions in item I. [Enter password / Change password](#).

In this menu the managers also have the possibility to process goals.

V. Help



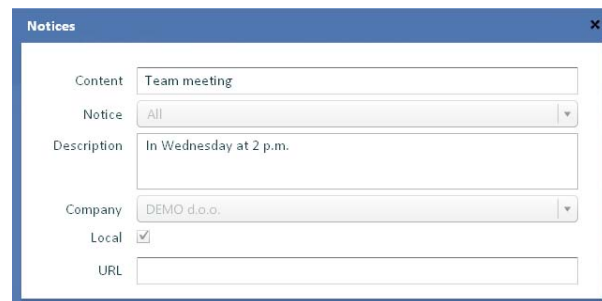
In the »Help« menu you will find different information and instructions on how to work with this programme.

VI. News



When you confirm the »News« menu a window will open where you will find different notices intended either for you personally or to the whole team. You will also be able to:

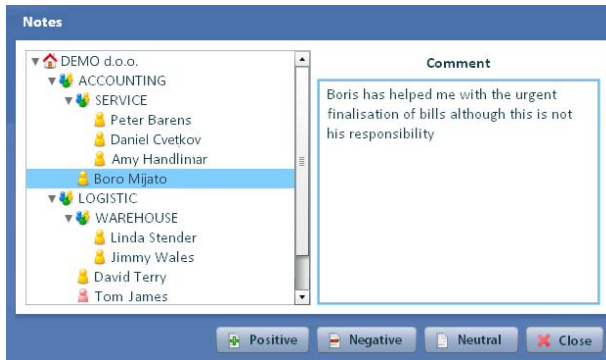
- a. write a new notice for your administrator,
- b. inform the administrator about an error or submit your suggestions and comments.



VII. Notes

When you click the »Notes« menu a window will open where you will be able to write in various types of notes and comments. It will enable you to add comments in a simple way to anyone in the company besides the people who are part of the assessment.

- a. Chose a person whom you wish to add a comment from the list on the left of the window.
- b. Enter your comment on the right hand side of the window and confirm the entry with »Neutral«, »Positive«, »Negative«. Whether you are able to use only one or all three options depends on your status.



Note: this enables you to enter your comments throughout the entire assessment period so that at the end of the current period, and based on the overview of all the entries, including those you entered at the beginning or in the middle of the period, you will be able to better:

- a. form the final grade
- b. enter the most appropriate comment, if necessary

The review of all the comments and entries is possible in the menu »Reports/Files«.