USER GUIDE · VERSION 1

Appraisal

Yearly or mid-year performance reviews. Staff rate themselves, their manager rates them without seeing those scores, and HR signs off the outcome.

1. What it is for
2. Open your appraisal
3. Fill in your self-appraisal
4. Check, change or answer your appraisal
5. Review a team member
6. Set up an appraisal round
7. See who has finished
8. Sign off an appraisal
9. Staff grades, departments and outlets

APPRAISAL

What it is for

For: Everyone

Appraisal replaces the paper performance review. Each review goes through four hands in order:

1. **The staff member** writes down what they set out to do, what they achieved, and rates themselves from 1 to 5.
2. **The appraiser**, the manager the staff member picks, rates the same items. The staff member's own scores stay hidden until the appraiser has submitted, so the manager is not swayed by them.
3. **The staff member** then sees both sets of scores side by side and says whether they agree.
4. **HR** checks the result, picks an outcome (for example a merit increment) and signs it off. A one-page summary can then be printed or saved as a PDF.

Who uses it

- **Staff**: open it on their phone with a one-time code sent by SMS or WhatsApp. No password is needed.
- **Appraisers**: any staff member who has been picked as someone's manager. They use the same screens as staff, and see a list of people waiting for their review.
- **HR**: set up each appraisal round, follow who has finished, and sign off results, in the admin screens. This needs the HR or super admin role.

The 1 to 5 scale

Score	Means
1 Very Unsatisfactory	Does not meet the required standards.
2 Unsatisfactory	Meets some required standards.
3 Satisfactory	Meets the required standards.
4 Good	Occasionally exceeds required standards.
5 Very Good	Consistently exceeds required standards.

What it needs

- A **staff directory**: names, employee numbers, positions, outlets or departments and staff grades. It is loaded by your system administrator; there is no screen for adding a person to it today. Someone who is not in the directory cannot start an appraisal.
- **Phone numbers** that can receive SMS or WhatsApp, for the one-time code and for the message that tells an appraiser someone is waiting.

Staff can switch the screens to English, Bahasa Melayu, Chinese, Nepali or Bengali with the **EN** button at the top.

The same module also runs staff surveys (**Surveys** on its front page). This guide covers appraisals only.

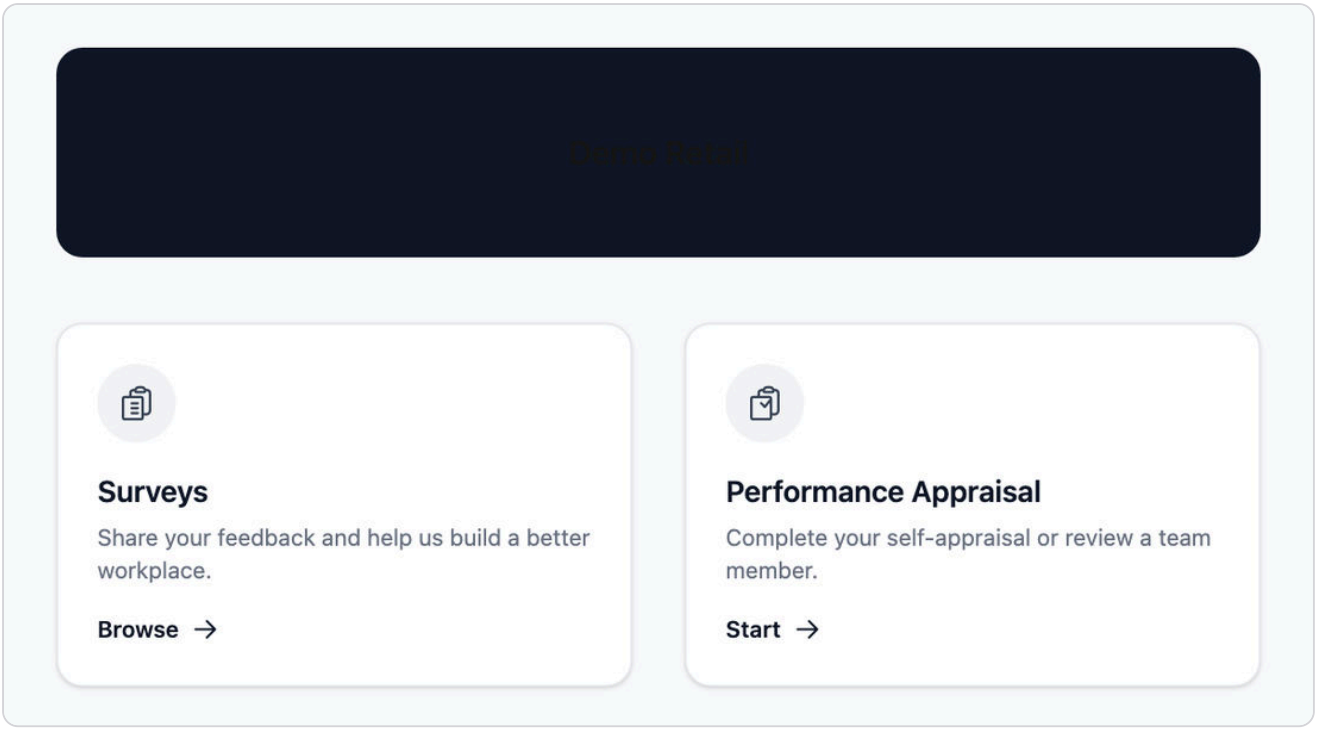
APPRAISAL

Open your appraisal

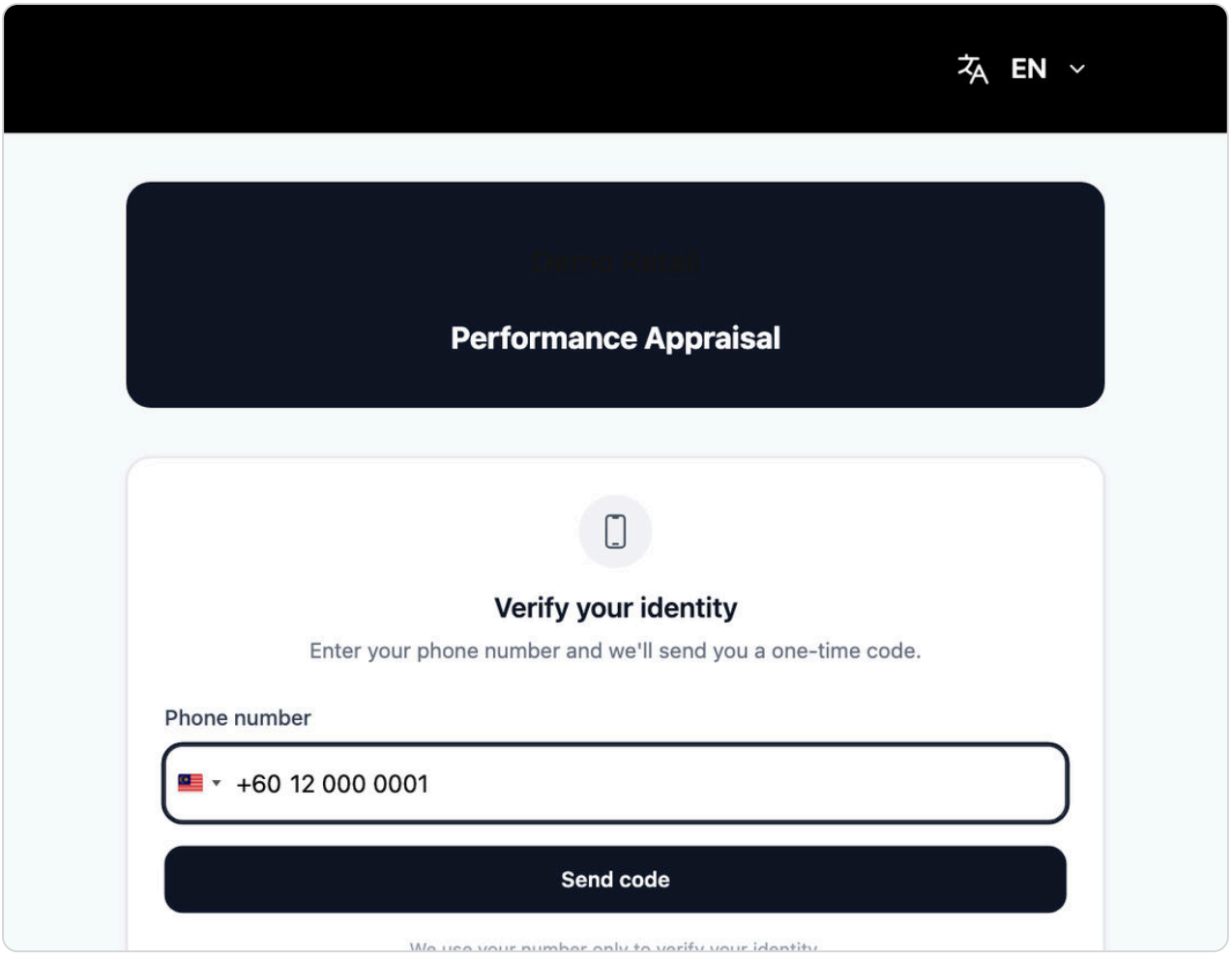
For: Staff and appraisers

You do not need a password. You prove who you are with a code sent to your phone.

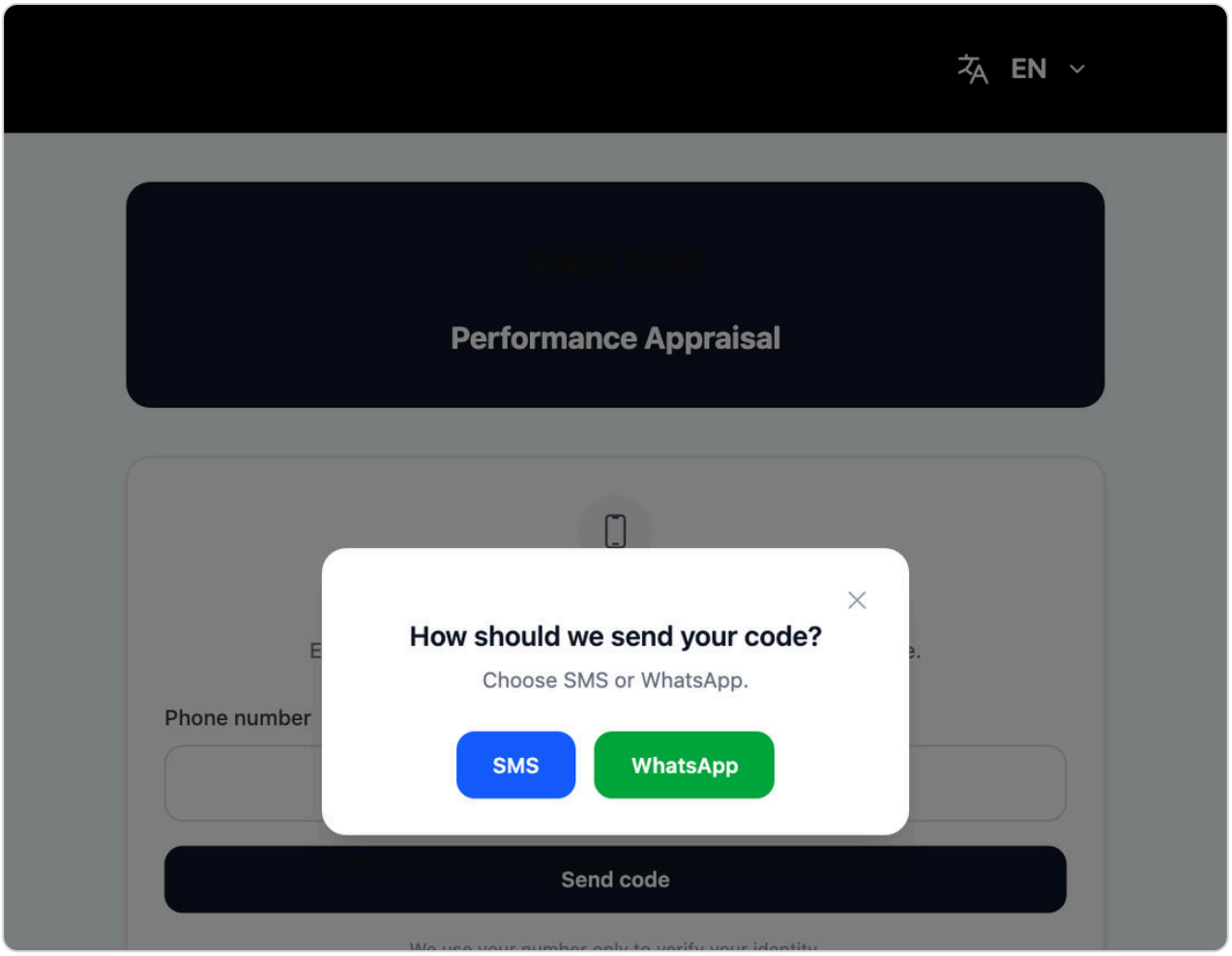
1. Open the Appraisal web address your HR team gave you. On the front page, press **Start** under **Performance Appraisal**.



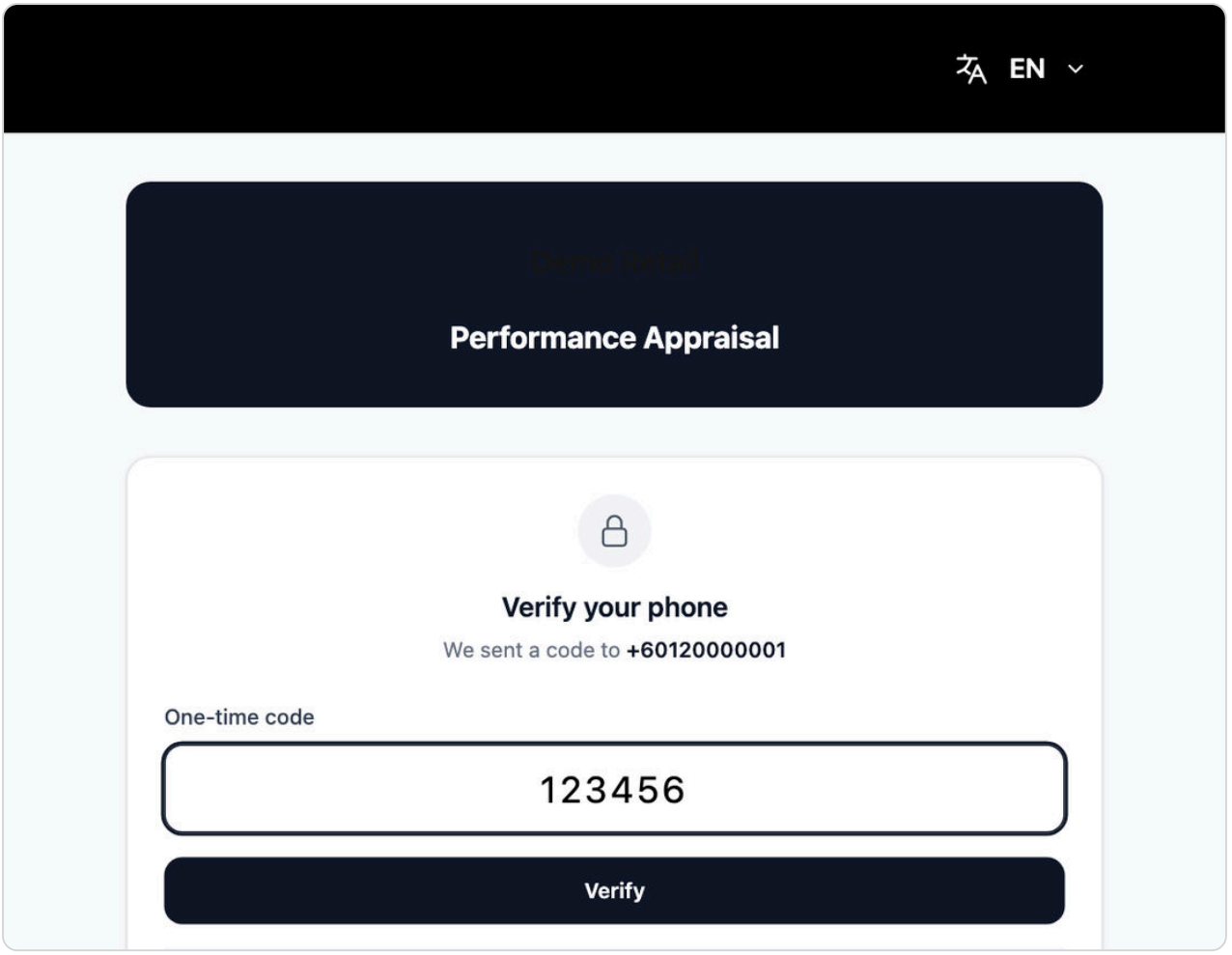
2. Type your phone number under **Phone number**. The country code (+60 for Malaysia) is already chosen; change it with the flag if you need to. Press **Send code**.



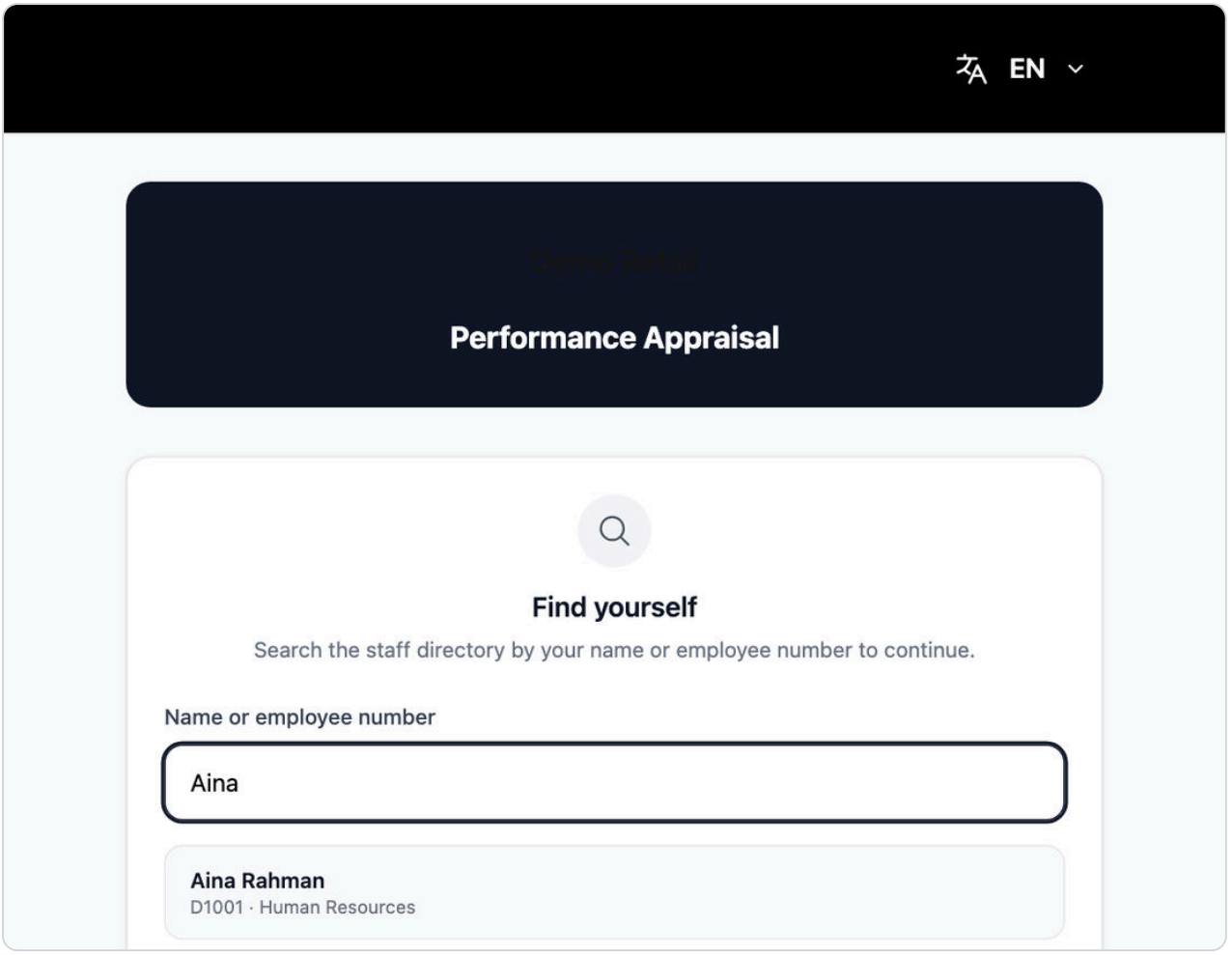
3. Choose **SMS** or **WhatsApp**.



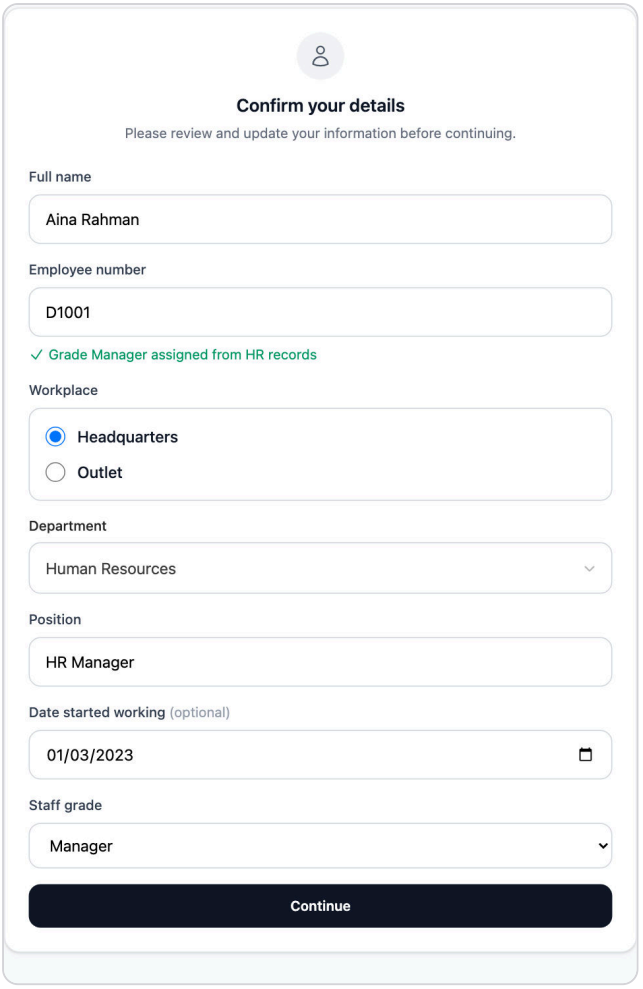
4. Type the 6-digit code you received under **One-time code** and press **Verify**. If it does not arrive, wait for the countdown and press **Resend code**.



5. **First time only:** the **Find yourself** screen opens. Type at least 2 letters of your name or your employee number, then press your name in the list.



6. On **Confirm your details**, check your name, employee number, workplace, position and staff grade. Correct anything that is wrong and press **Continue**.



You land on **My Appraisals**. If you only have your own self-appraisal to do, it opens straight away.

When something goes wrong

- **"No matching record"** on Find yourself: you are not in the staff directory yet. Ask HR to add you.
- **"Already linked"** next to your name: another phone number has already claimed that record. The last 4 digits of that number are shown. Ask HR to fix it.
- **"Employee number not found"**: the number you typed does not match the directory. Check it with HR.
- **The code never arrives:** press **Can't receive the code? Log in with your account** and sign in with your company account (phone number and password) instead. If you see "Your account has no phone number linked", ask HR.
- To leave, press your name at the top right and choose **Log out**.

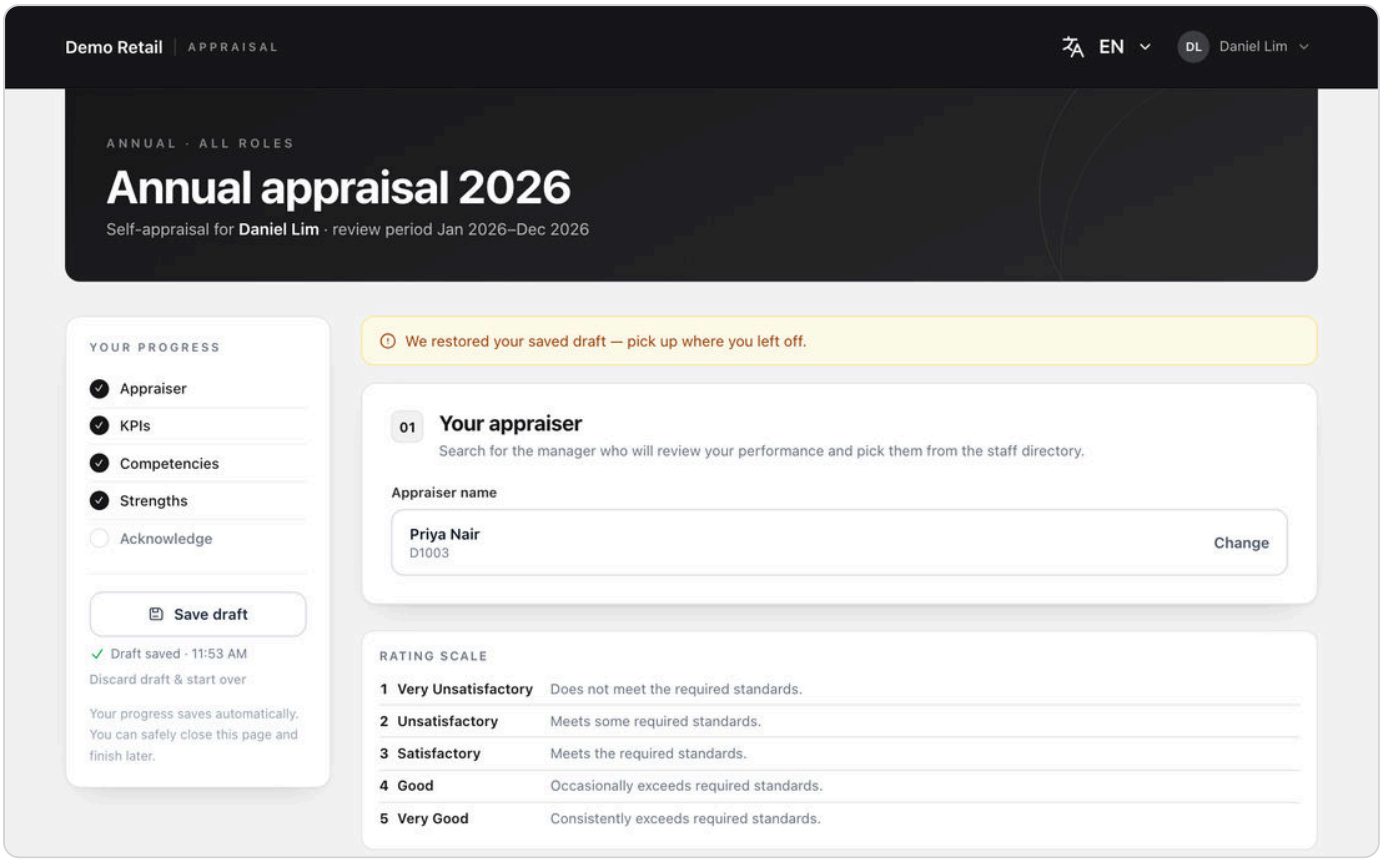
APPRAISAL

Fill in your self-appraisal

For: Staff

Your answers save by themselves every time you change something. You can close the page and come back later; you will see "We restored your saved draft — pick up where you left off."

The list on the left, **Your progress**, ticks each part as you finish it.



1. Your appraiser

Type your manager's name or employee number in the search box and press their name. To pick someone else, press **Change**. You cannot pick yourself.

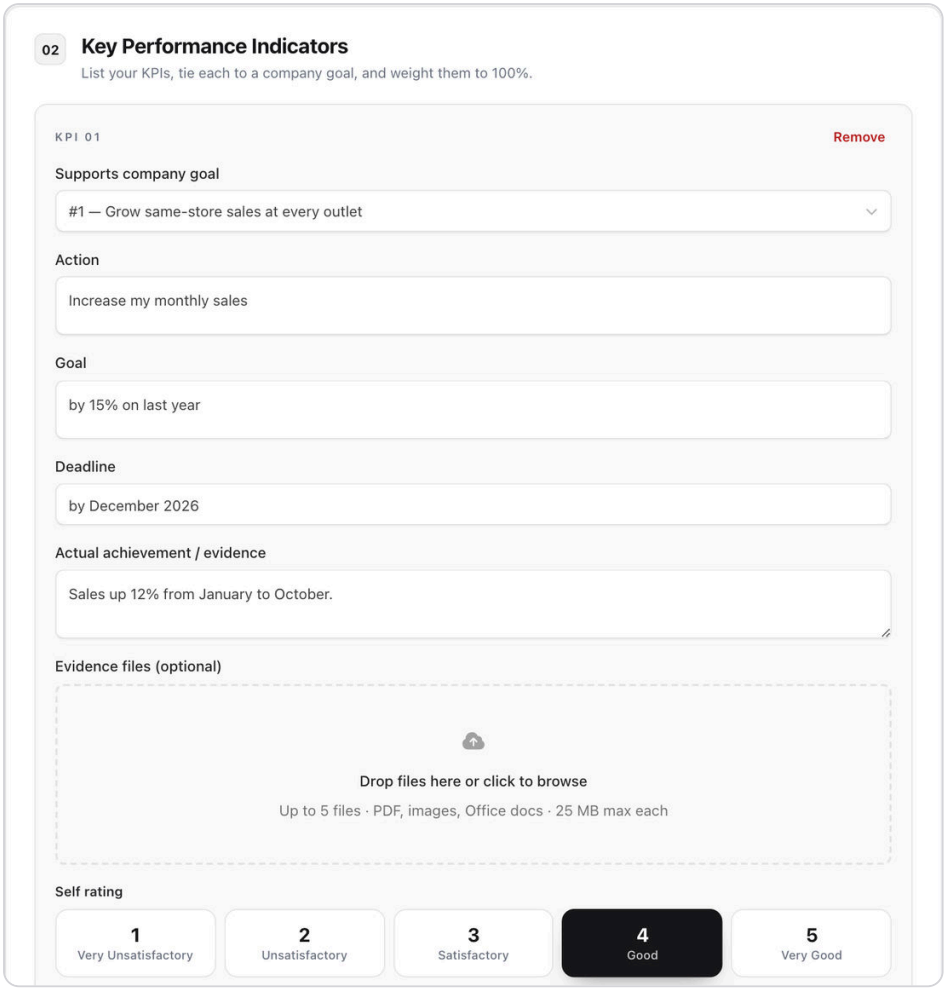
2. Key Performance Indicators

A KPI, or key performance indicator, is one thing you were expected to deliver this period. For each one:

1. Under **Supports company goal**, pick the company goal it helps. HR sets this list.
2. **Action**: what you set out to do ("Increase my monthly sales").

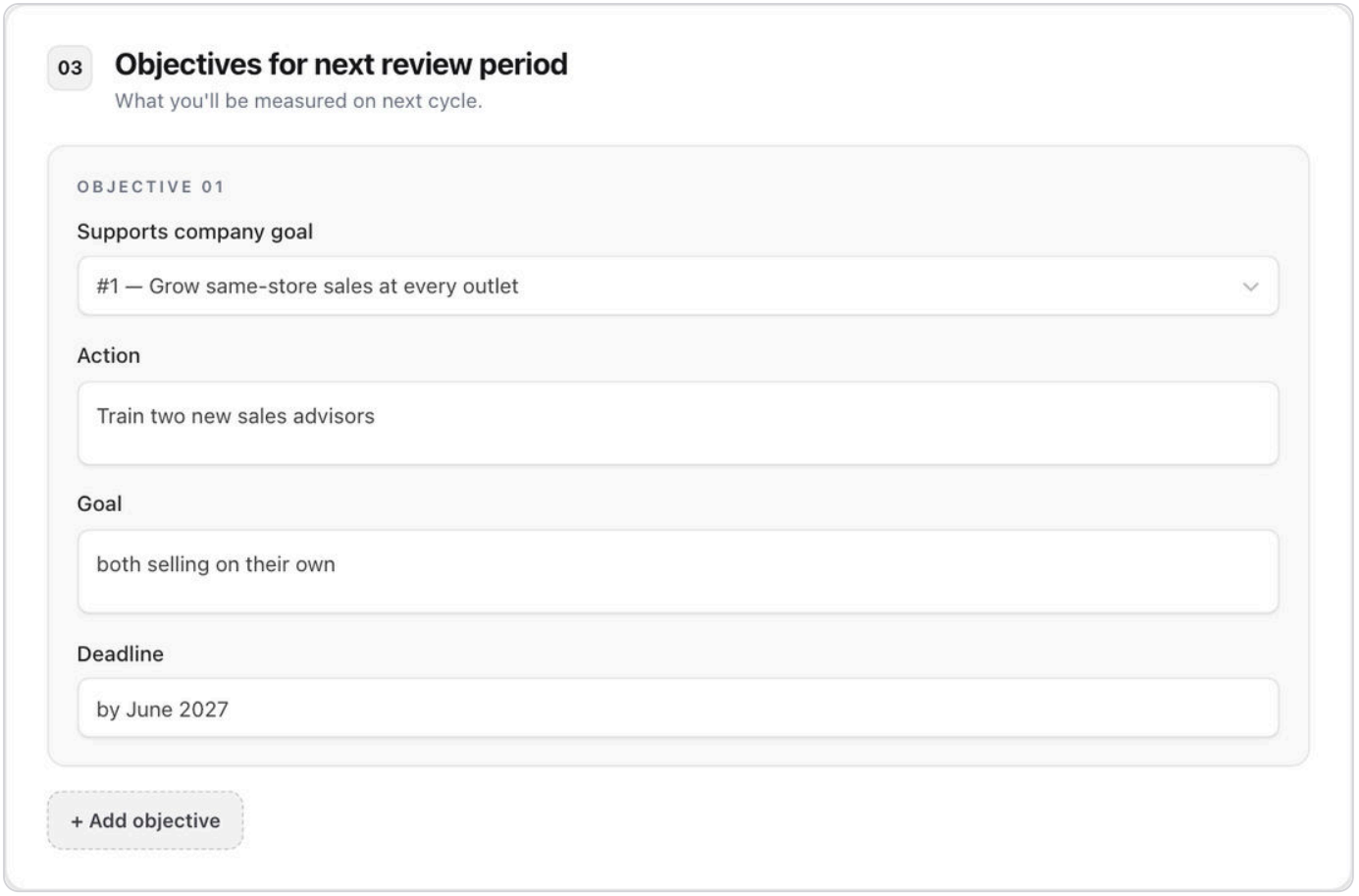
3. **Goal**: how much ("by 15% on last year").
4. **Deadline**: by when.
5. **Actual achievement / evidence**: what actually happened, in numbers where you can.
6. **Evidence files (optional)**: drop in up to 5 files (PDF, pictures or Office files, 25 MB each).
7. Under **Self rating**, press the score from 1 to 5 that fits.

Press **+ Add KPI** for another one, or **Remove** to delete one.



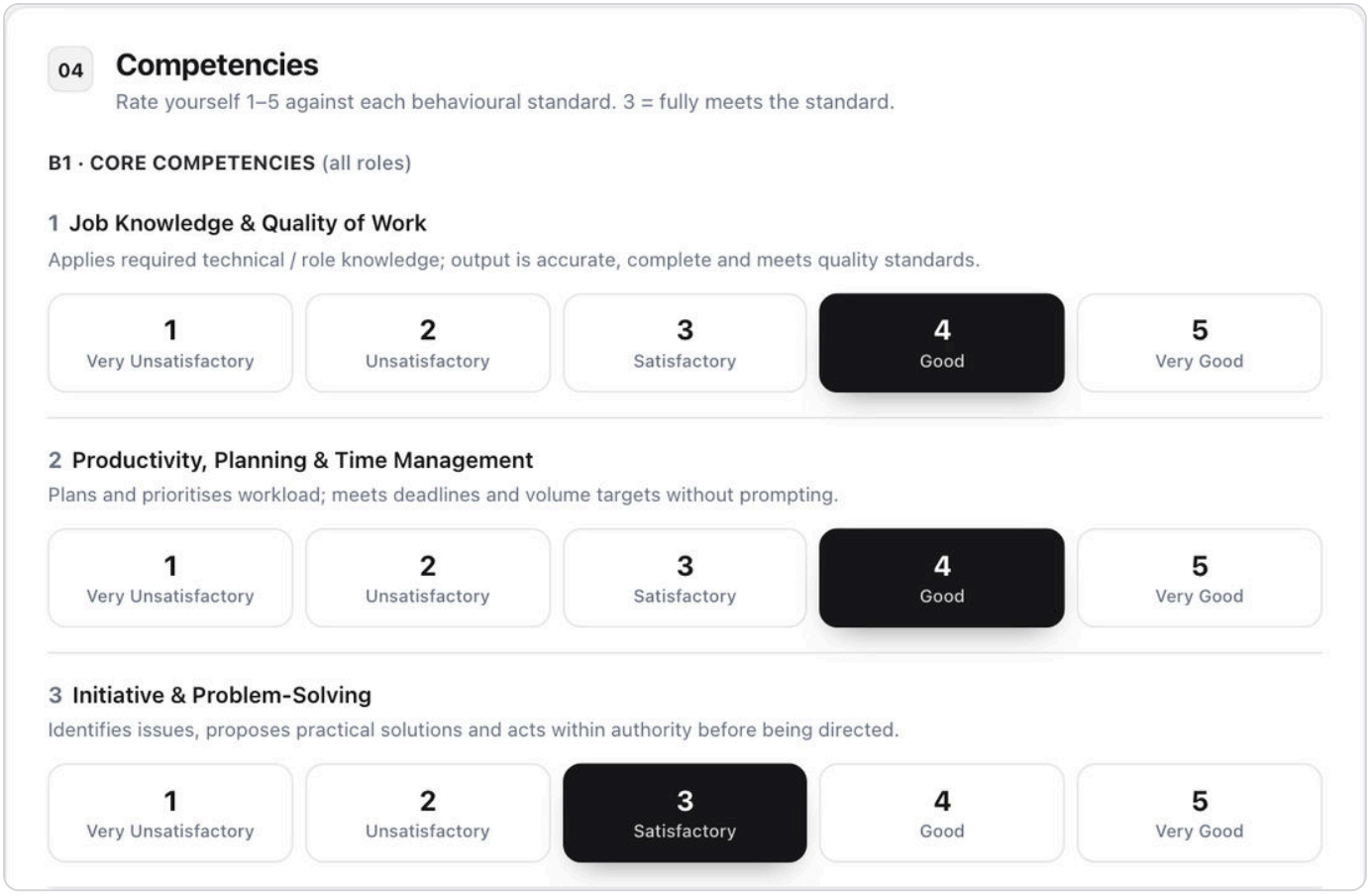
3. Objectives for next review period

Write at least one thing you want to be measured on next time, in the same way: company goal, **Action**, **Goal** and **Deadline**. Press **+ Add objective** for more. Your appraiser can change these.



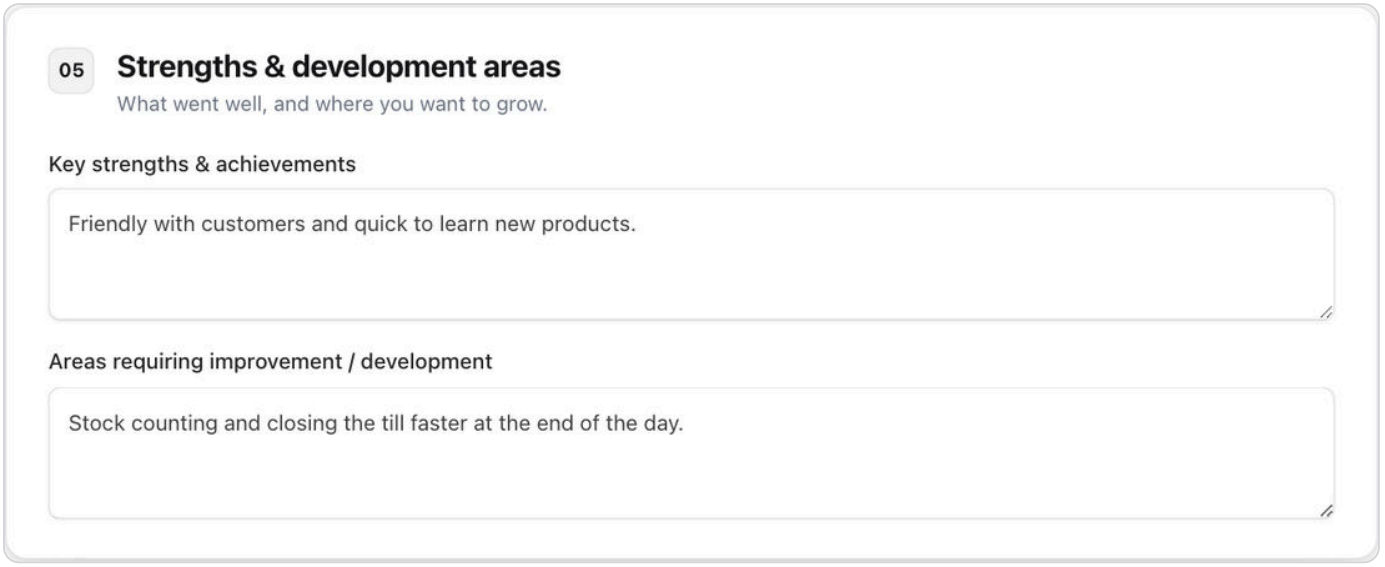
4. Competencies

Rate yourself from 1 to 5 on each behaviour listed. 3 means you fully meet the standard. Everyone rates the 7 **Core Competencies**. Managers also rate 5 **Leadership Competencies**; whether you see them depends on your staff grade.



5. Strengths & development areas

Write what went well under **Key strengths & achievements** and where you want to grow under **Areas requiring improvement / development**.



Submit

Press **Submit appraisal** at the bottom. By submitting you confirm the appraisal is accurate and agree it will be reviewed by your appraiser and HR.

If something is missing, the page shows what to fix. Once it is accepted, your appraiser is sent a WhatsApp message with a link to your review.

To throw away your draft and begin again, press **Discard draft & start over** on the left. This cannot be undone.

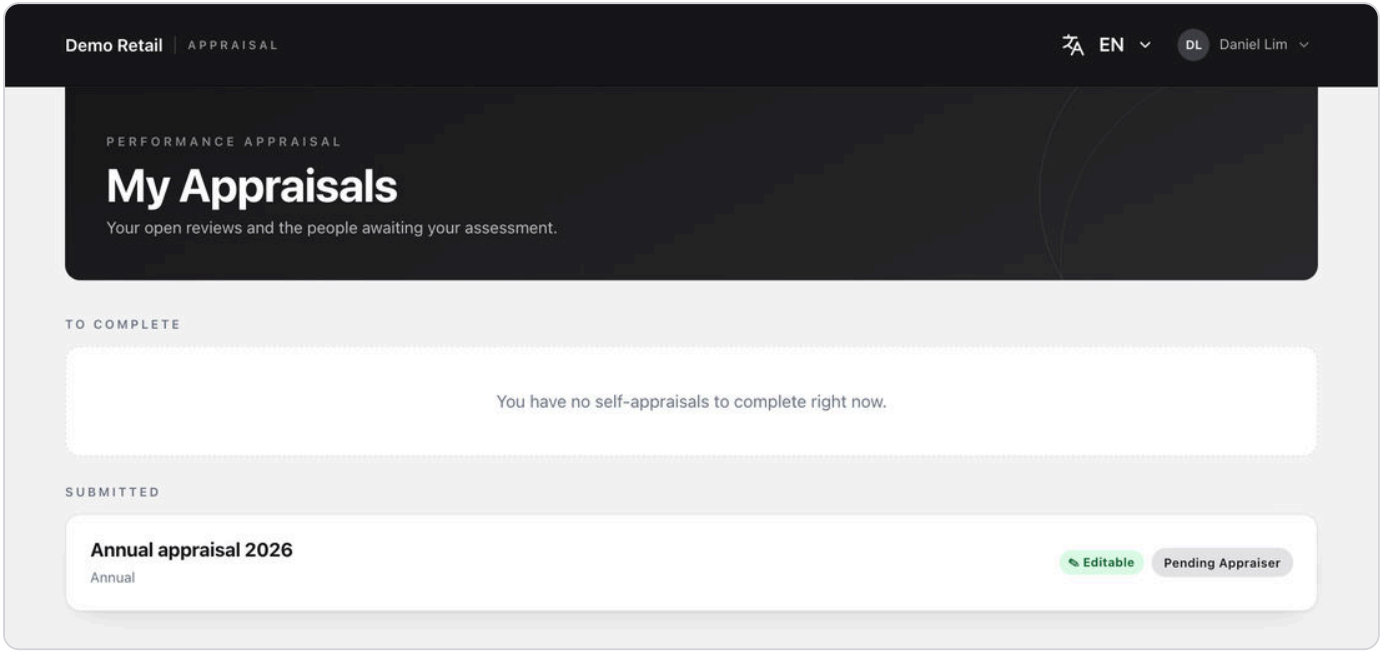
APPRAISAL

Check, change or answer your appraisal

For: Staff

After you submit, your appraisal moves to **Submitted** on **My Appraisals**. The grey label shows where it is:

- **Pending Appraiser**: waiting for your appraiser.
- **Appraiser Locked**: your appraiser has rated you.
- **Completed**: HR has signed it off.

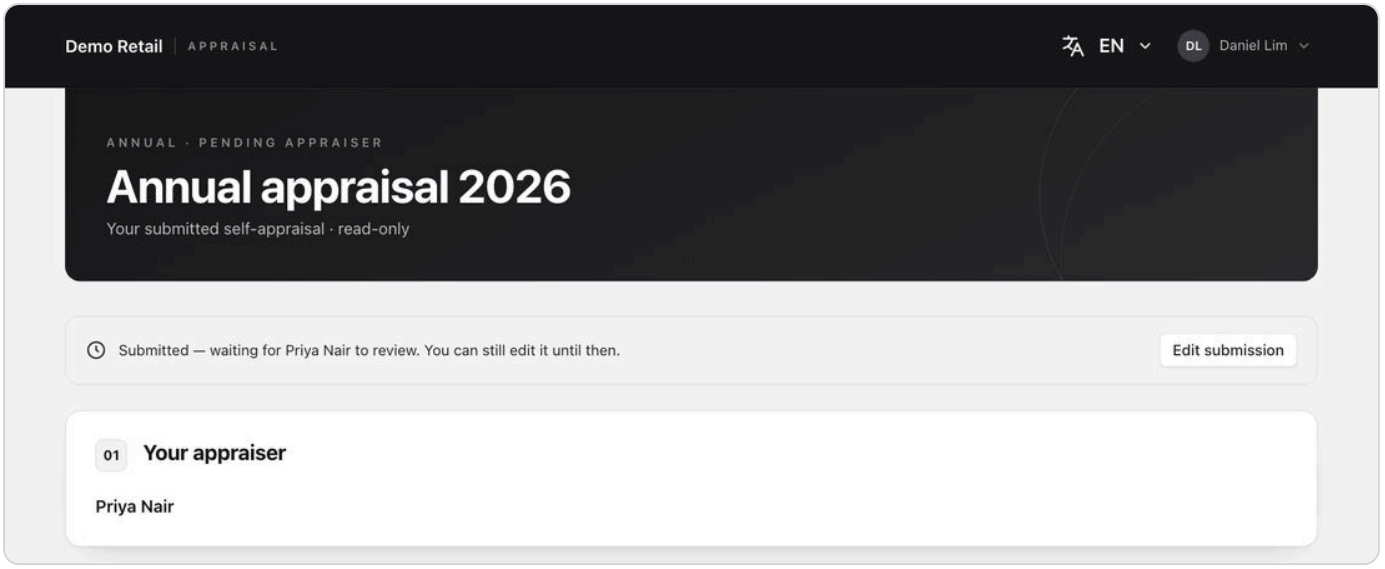


Press the appraisal to read what you sent.

Change it before your appraiser reviews it

While the green **Editable** label shows, you can still make changes.

1. Open the appraisal and press **Edit submission**.
2. Confirm. Your appraisal is taken back from your appraiser and opens as a form again.
3. Make your changes and press **Submit appraisal** again.

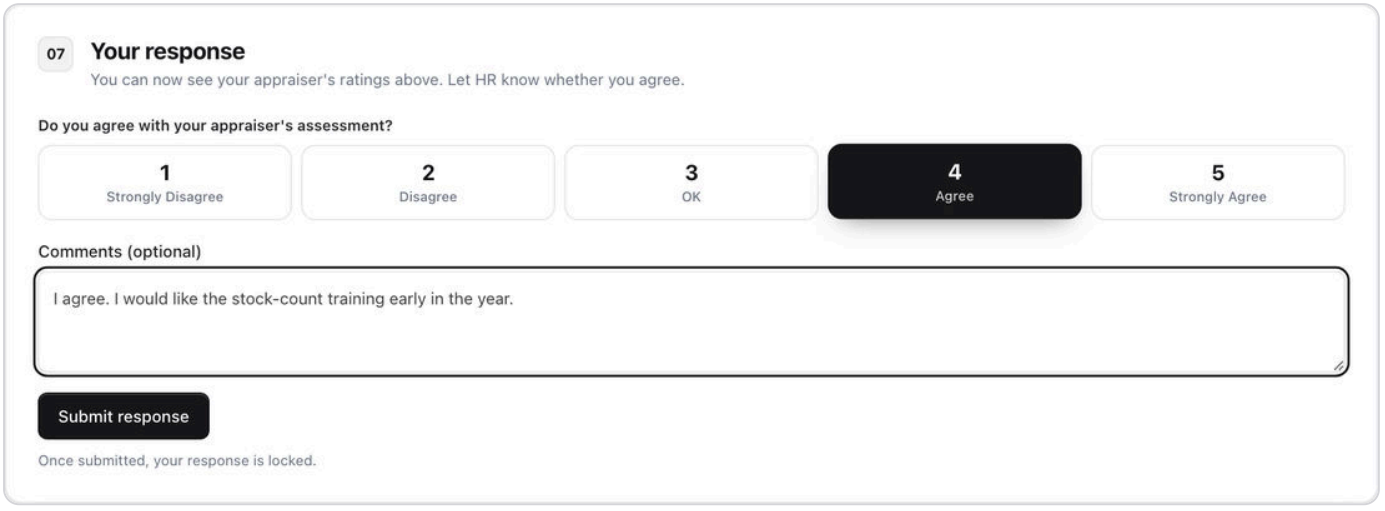


Once your appraiser has submitted their ratings, you can no longer change yours.

Say whether you agree

When your appraiser has finished, open the appraisal again. You now see their score next to yours for every item, and their comment.

1. At the bottom, under **Your response**, answer **Do you agree with your appraiser's assessment?** from **1 Strongly Disagree** to **5 Strongly Agree**.
2. Add **Comments (optional)** if you want HR to know why.
3. Press **Submit response**. Your response is then locked.



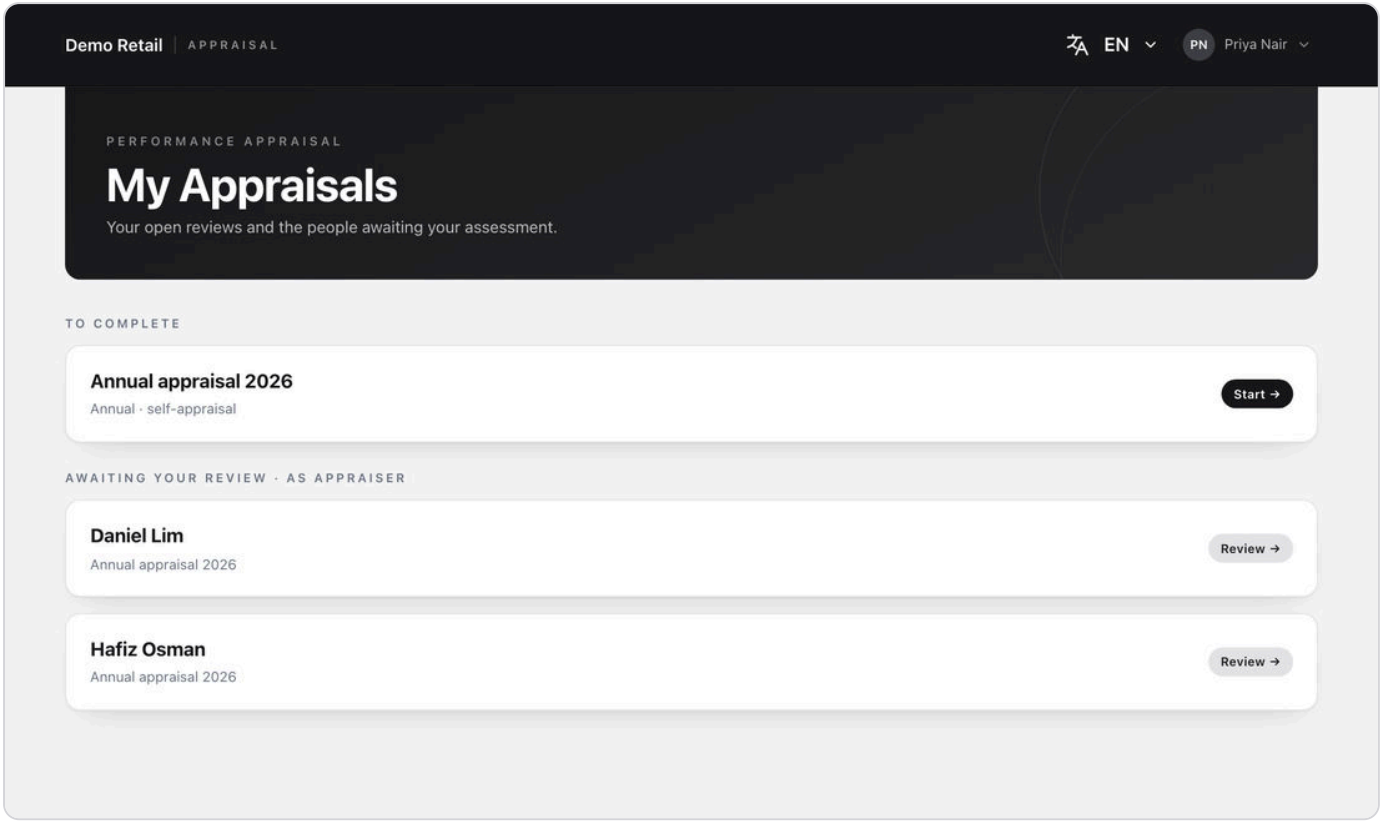
HR can see your answer straight away.

APPRAISAL

Review a team member

For: Appraisers

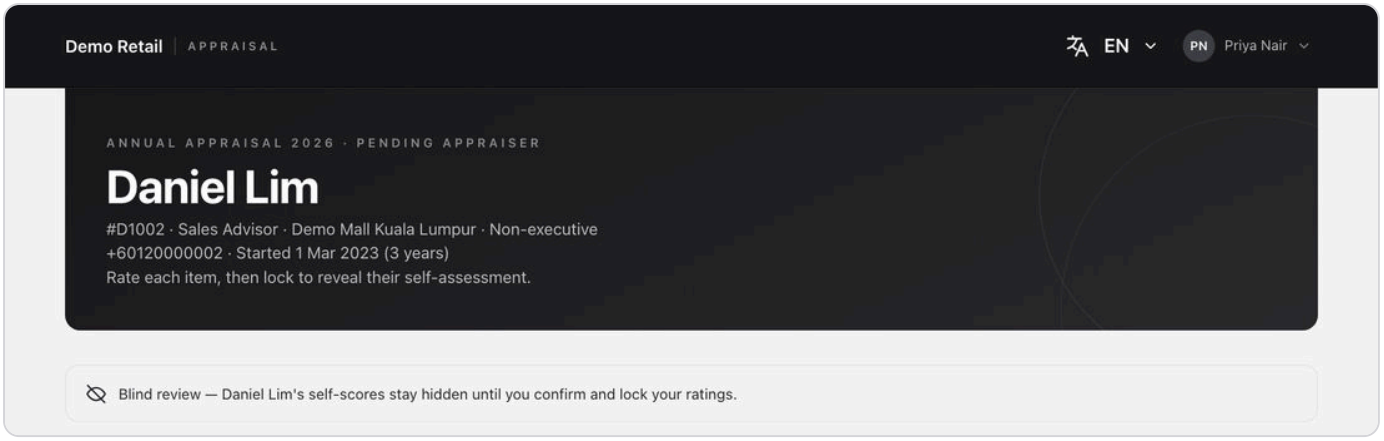
When someone picks you as their appraiser and submits, you get a WhatsApp message with a link. The link opens their review directly. You can also open the Appraisal page yourself (see "Open your appraisal"); people waiting for you are listed under **Awaiting your review · as appraiser**.



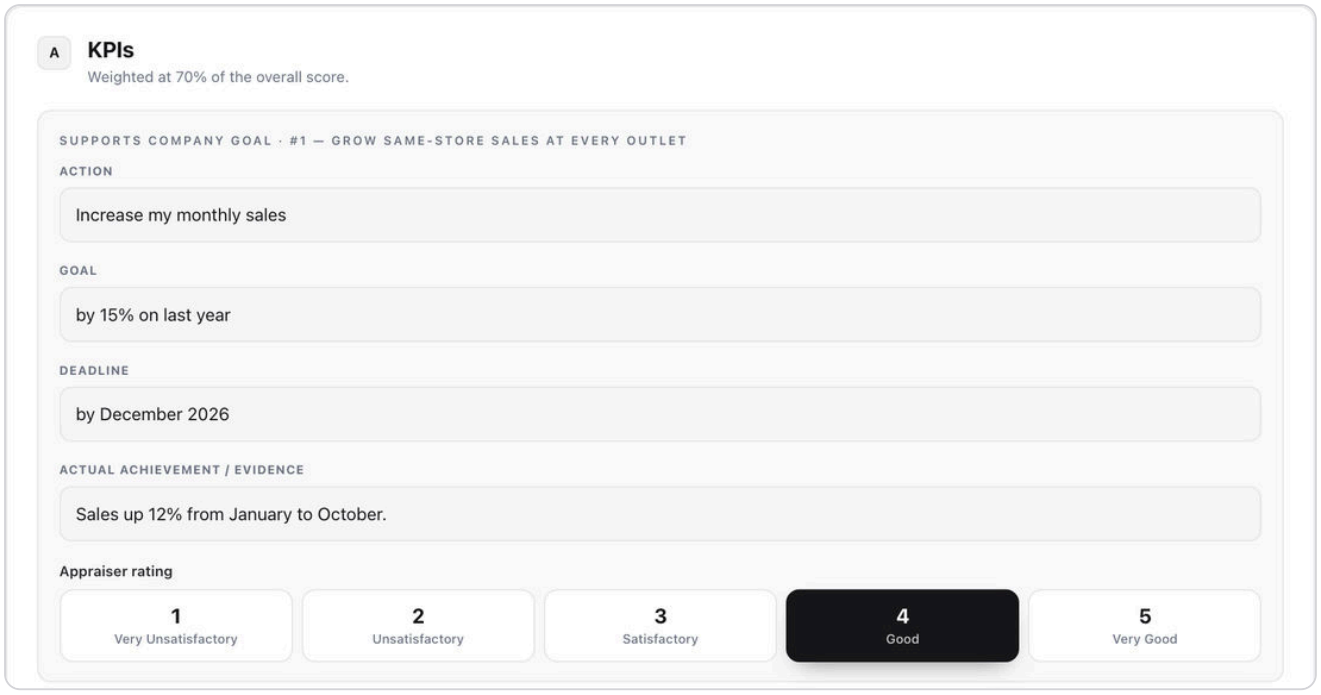
Press **Review** next to the person.

Rate without seeing their scores

This is a blind review: the staff member's own scores stay hidden until you submit yours. You see everything else they wrote.



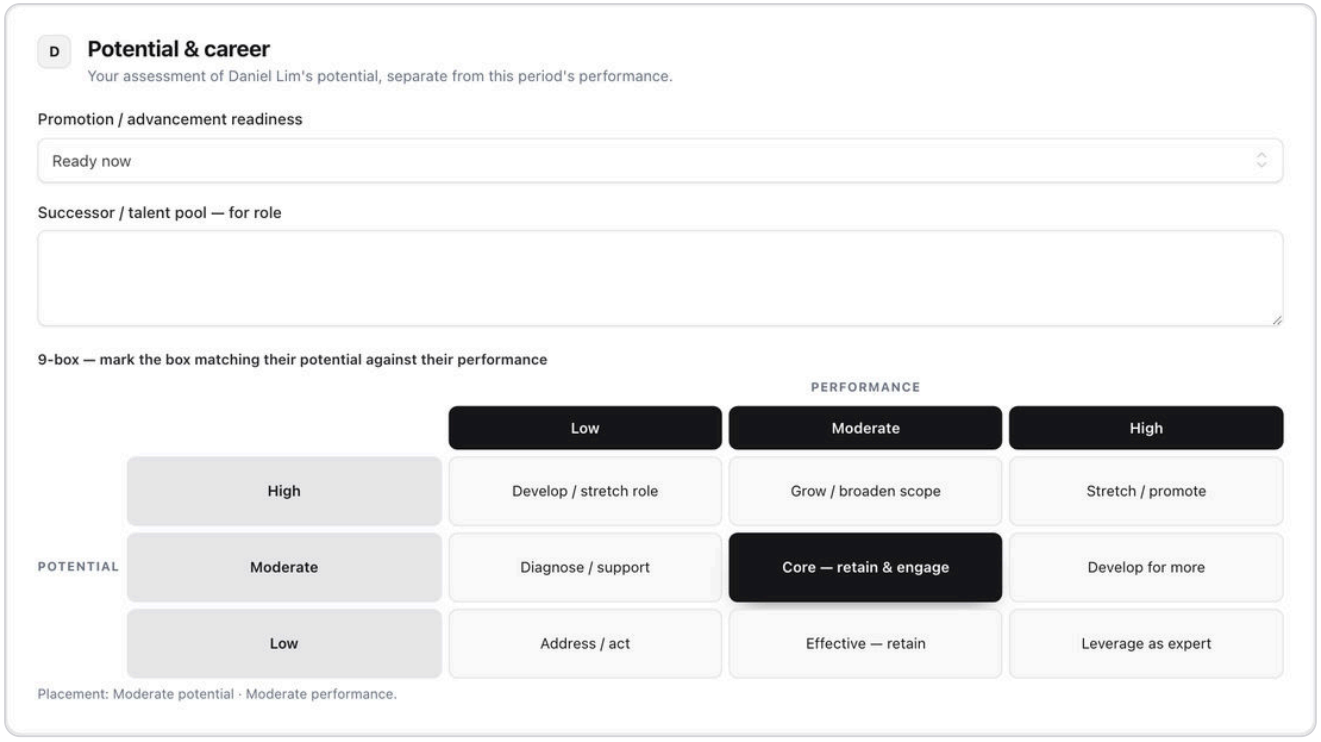
1. **A · KPIs**: read each KPI and press a score from 1 to 5 under **Appraiser rating**.



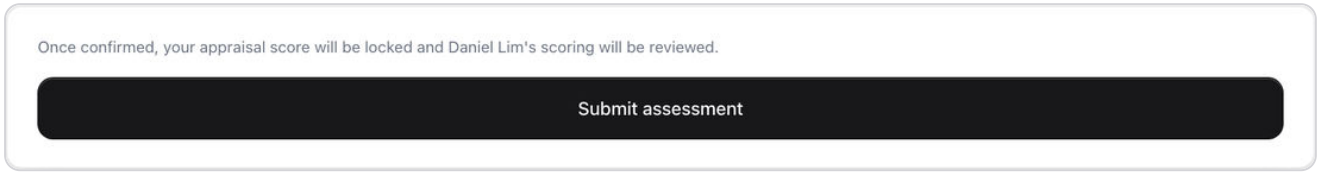
2. **B · Competencies**: score each behaviour the same way.
3. **Objectives for next review period**: the objectives the staff member proposed. Change them, delete them or press **+ Add objective**. This list becomes final when you submit. At least one is needed.
4. **C · Development & training plan**: press **+ Add development item**, then write the gap, the agreed action and pick a **Deadline**.



5. **D · Potential & career**: choose **Promotion / advancement readiness**, name a role they could step into if any, and press the box in the 9-box grid that matches their potential (rows) against their performance (columns).



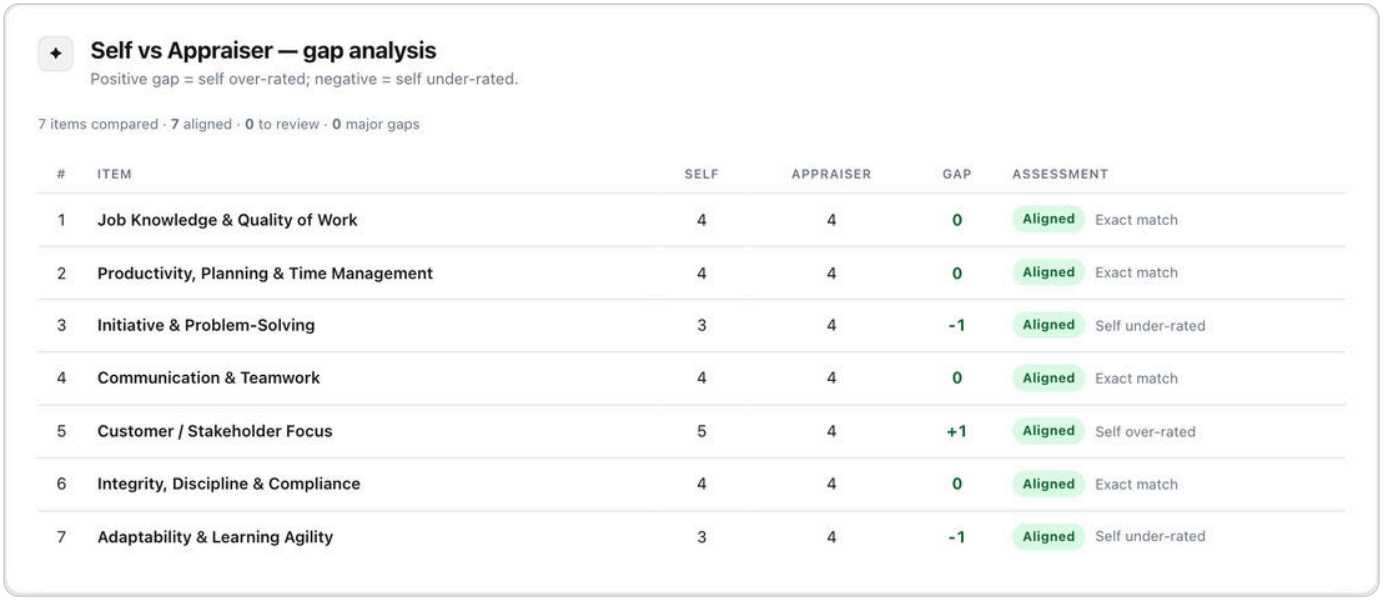
6. **E · Reviewer comment**: your overall feedback. The staff member sees it after you submit.
7. Press **Submit assessment** and confirm.



Compare your scores with theirs

After you submit, the page shows **Self vs Appraiser — gap analysis**: their score, yours, and the difference for each item.

- A **positive** gap means they rated themselves higher than you did. A **negative** gap means lower.
- **Aligned**: 1 point apart or less. **Review**: 2 apart. **Major gap**: 3 or more apart.



Self vs Appraiser — gap analysis

Positive gap = self over-rated; negative = self under-rated.

7 items compared · **7** aligned · **0** to review · **0** major gaps

#	ITEM	SELF	APPRAISER	GAP	ASSESSMENT
1	Job Knowledge & Quality of Work	4	4	0	Aligned Exact match
2	Productivity, Planning & Time Management	4	4	0	Aligned Exact match
3	Initiative & Problem-Solving	3	4	-1	Aligned Self under-rated
4	Communication & Teamwork	4	4	0	Aligned Exact match
5	Customer / Stakeholder Focus	5	4	+1	Aligned Self over-rated
6	Integrity, Discipline & Compliance	4	4	0	Aligned Exact match
7	Adaptability & Learning Agility	3	4	-1	Aligned Self under-rated

Until the staff member responds, and before HR signs it off, you can still change your ratings: make the changes and press **Update assessment**. After that, the review is closed for you.

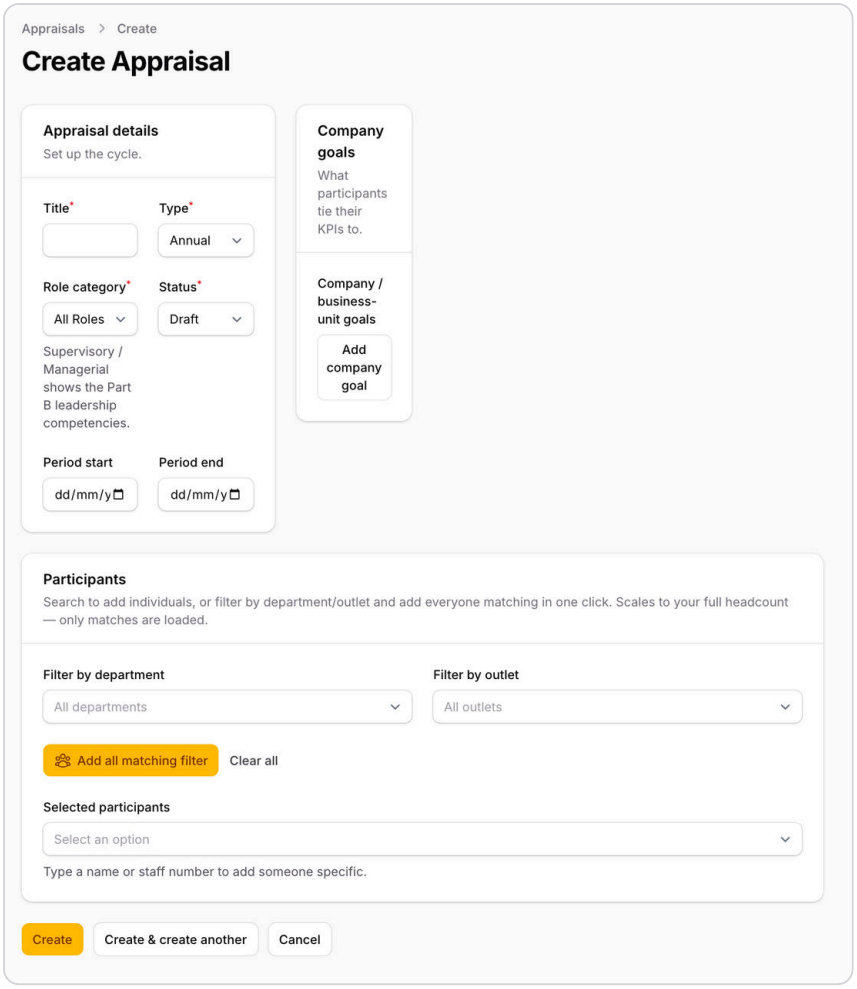
APPRAISAL

Set up an appraisal round

For: HR

An appraisal round is one review period for a group of staff, for example "Annual appraisal 2026". You set it up in the admin screens: open the Appraisal web address with **/admin** at the end and sign in with your company account. You need the HR or super admin role.

1. In the menu on the left, under **Appraisal**, press **Appraisals**, then **New appraisal** at the top right.
2. Under **Appraisal details**:
    - **Title**: the name staff will see.
    - **Type**: Annual, Mid-Year, Quarterly, Probation / Confirmation or Other.
    - **Role category**: All Roles or Supervisory / Managerial Roles. Today this only groups results in the **Variance Report**. Whether a person also rates the leadership behaviours is decided by their staff grade (see "Staff grades, departments and outlets").
    - **Status**: leave it on **Draft** while you prepare. Staff see the round only when it is **Active**.
    - **Period start** and **Period end**: the months being reviewed.
3. Under **Company goals**, press **Add company goal** for each goal staff can link their KPIs to. Give each a **Ref #** (1, 2, 3...) and the **Objective (English)**. Open **Translations** to add the same goal in other languages; leave them blank to show the English.
4. Under **Participants**, choose who takes part:
    - Pick a department or outlet in **Filter by department** or **Filter by outlet**, then press **Add all matching filter**.
    - Or type a name or staff number in **Selected participants** to add one person.
    - **If you add nobody, everyone takes part:** each staff member is added the first time they open the Appraisal page.
5. Press **Create**.



When you are ready, open the round again (**Edit**), set **Status** to **Active** and press **Save changes**. Then tell staff to open their appraisal.

To add someone later, open the round and press **Add participant** in the **Participants** list at the bottom.

Setting **Status** to **Closed** stops new self-appraisals and reviews from appearing on staff screens. What has already been submitted stays.

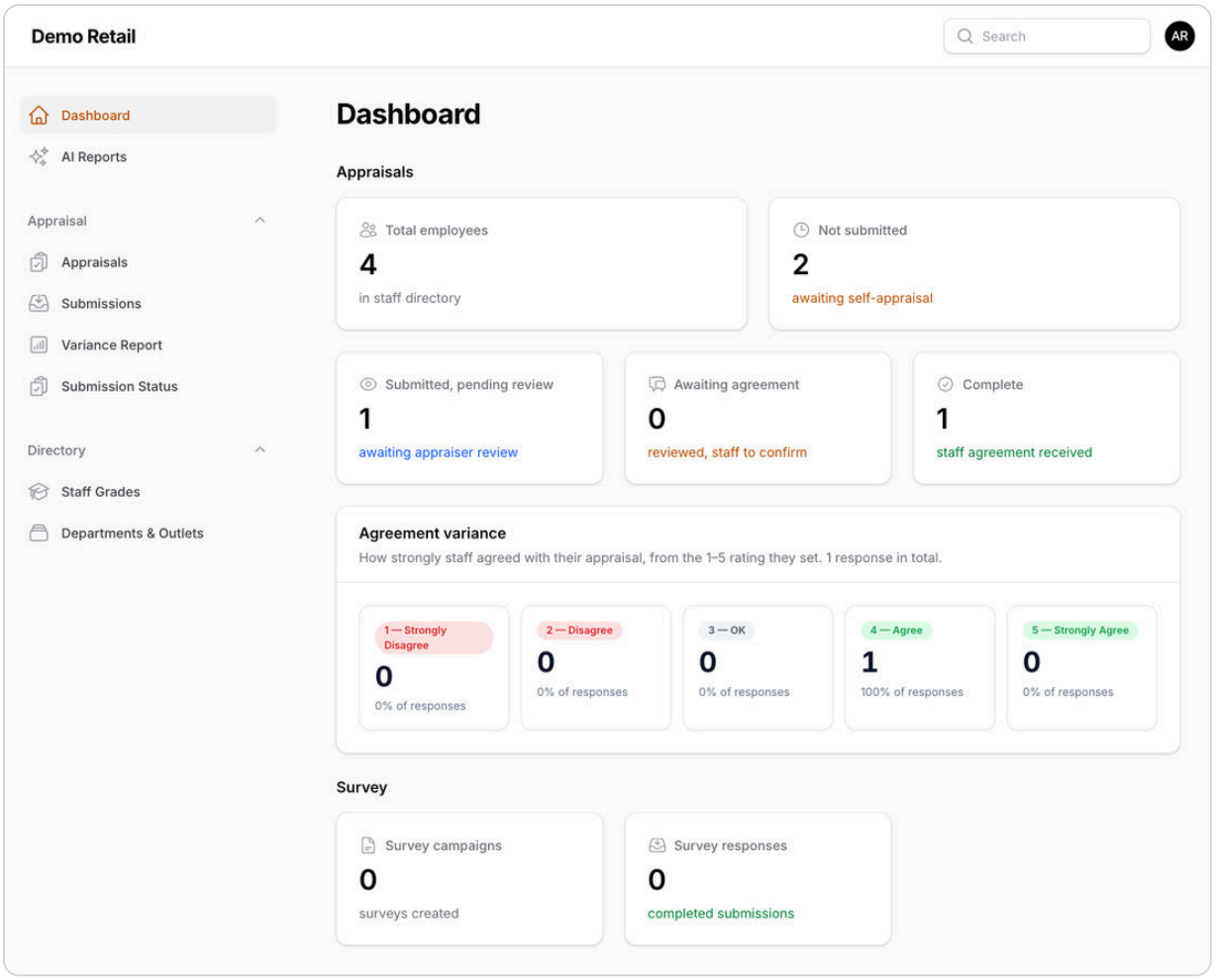
APPRAISAL

See who has finished

For: HR

Dashboard

Dashboard, at the top of the menu, counts everyone in the staff directory by stage: **Not submitted**, **Submitted, pending review**, **Awaiting agreement** (the appraiser has rated, the staff member has not answered yet) and **Complete**. **Agreement variance** shows how many staff answered each point from **1 — Strongly Disagree** to **5 — Strongly Agree**.

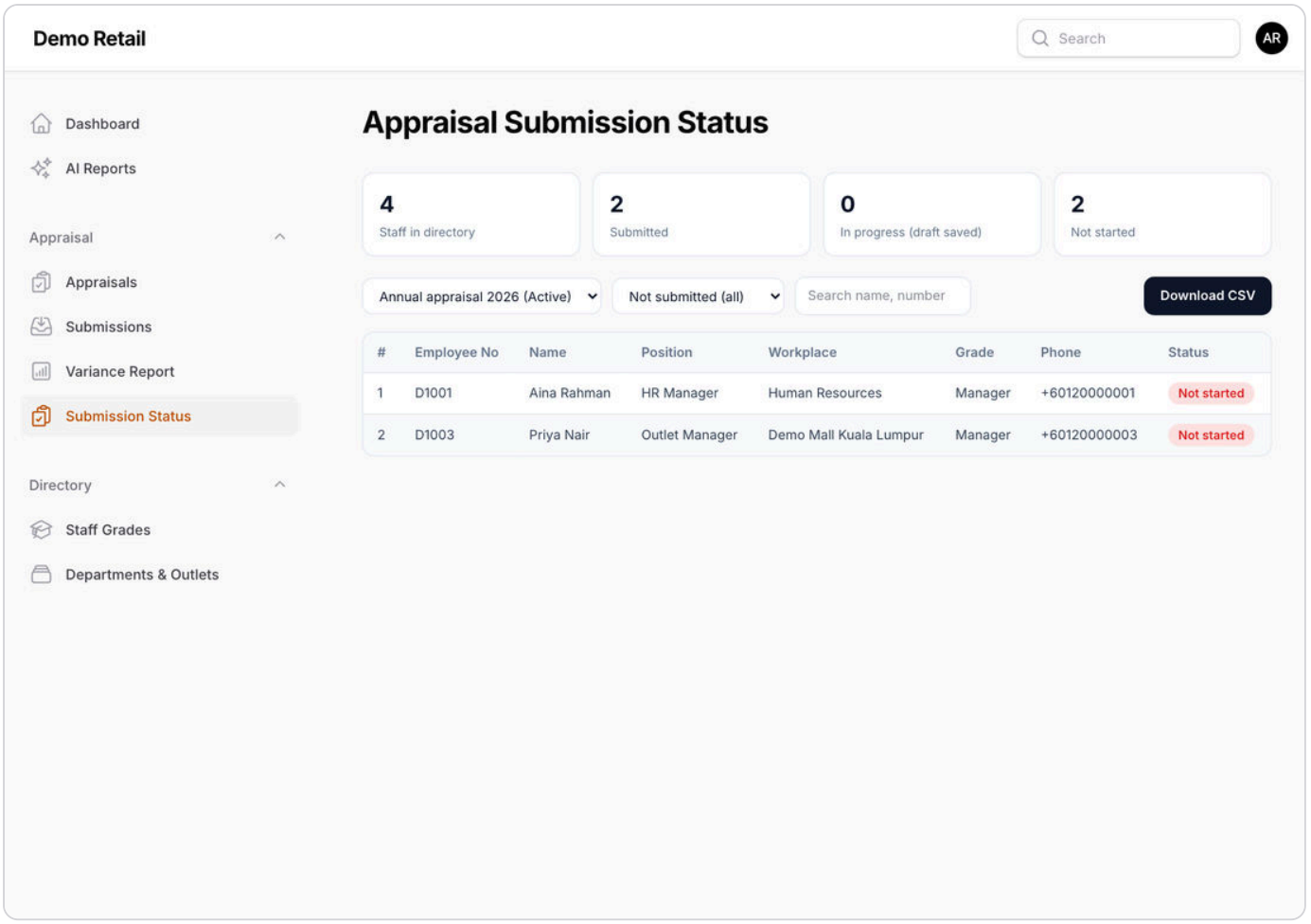


Who still has to start

Submission Status lists every person in the staff directory against the active round, including people who have never opened the Appraisal page.

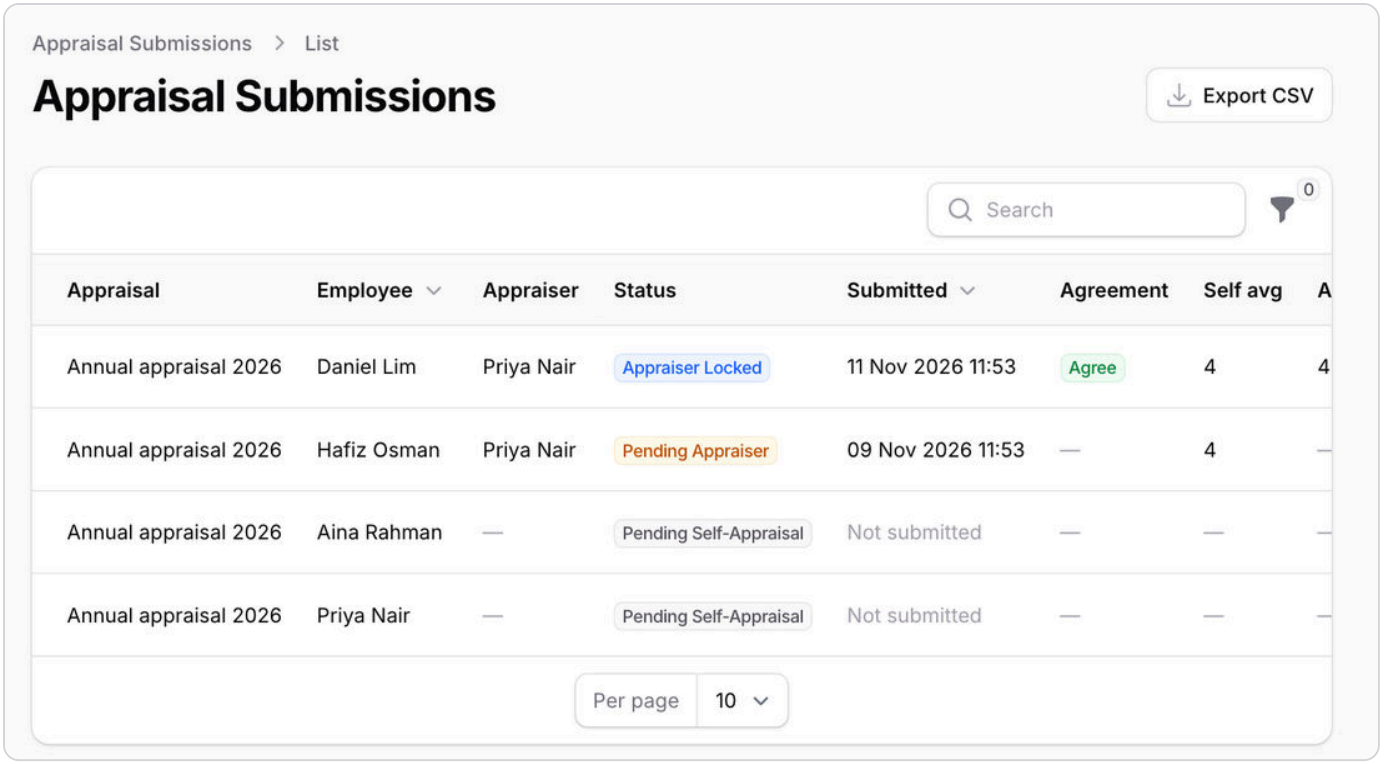
1. Pick the round in the first drop-down.

2. Pick who to show: **Not submitted (all)**, **Not started only**, **In progress only** (a draft is saved), **Submitted only** or **Everyone**.
3. Type in **Search name, number** to find one person.
4. Press **Download CSV** to get the list as a spreadsheet file, for example to send reminders.



Every submission

Submissions lists every participant with their appraiser, stage, the date they submitted, whether they agreed, and both averages. Press **View** on a row to read the whole appraisal. **Export CSV** downloads the list.



Where self-scores and manager scores differ

Variance Report shows, for each competency, how many reviews were **Aligned** (1 point apart or less), to **Review** (2 apart) or a **Major Gap** (3 or more apart). Press a number to see the staff in it. The agreement variance table from the dashboard is repeated at the top.

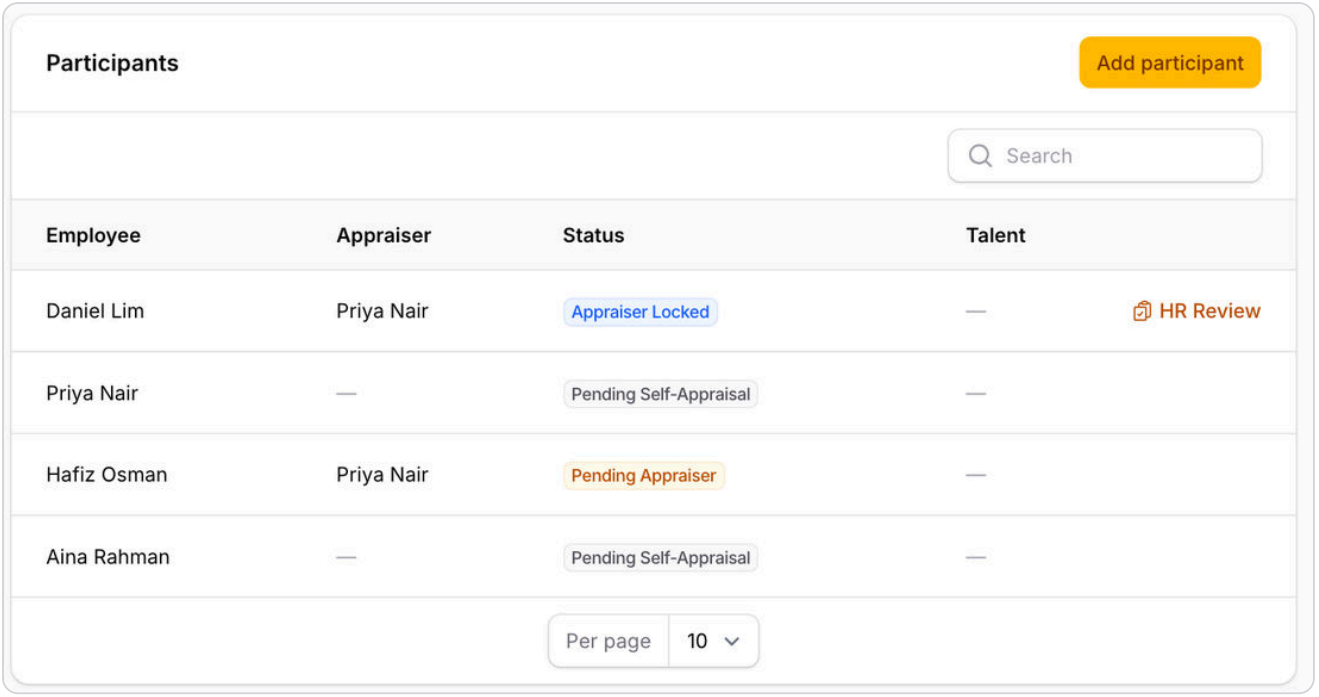
APPRAISAL

Sign off an appraisal

For: HR

You can sign off once the appraiser has submitted (the status shows **Appraiser Locked**). It is better to wait until the staff member has answered whether they agree: their answer shows in the **Agreement** column of **Submissions**. Signing off also closes the appraisal to the appraiser.

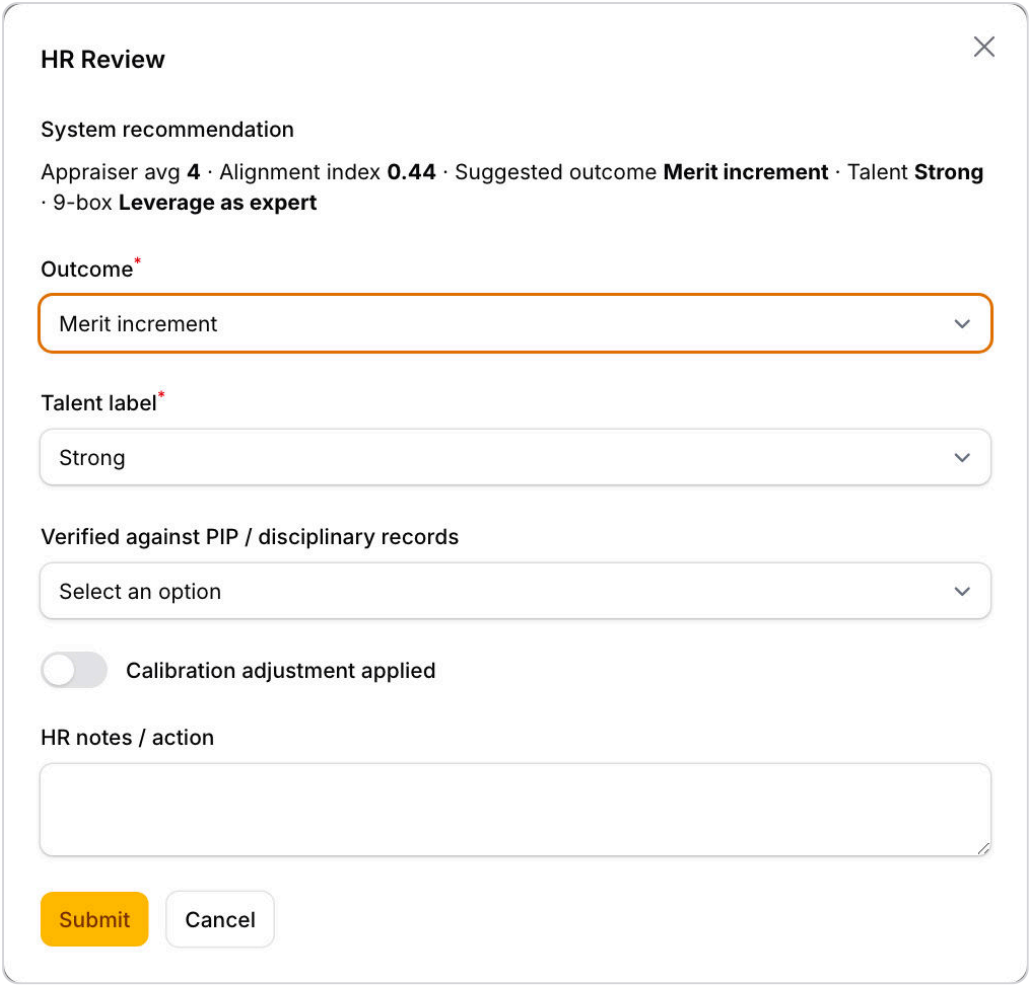
1. Press **Appraisals** in the menu, then **Edit** next to the round.
2. Scroll down to **Participants**. Press **HR Review** on the person's row.



3. **System recommendation** at the top suggests an outcome, a talent label and a 9-box action, worked out from the appraiser's average score and how far the two sets of scores differ. The fields below are filled in with these suggestions. Change any you disagree with:
    - **Outcome**: for example Merit increment, Bonus eligible, Promotion recommended, or Performance Improvement Plan (PIP).
    - **Talent label**: Star, Strong, Solid, Watch or At Risk.
    - **Verified against PIP / disciplinary records**: N/A, Checked, no conflict, or Conflict — escalated.
    - **Calibration adjustment applied**: switch it on only if you change the rating after comparing across teams, then give the **Adjusted rating** and the reason.

- **HR notes / action**: anything to follow up.

4. Press **Submit**. The appraisal is marked **Completed**, with your name and the date.



Print the summary

After sign-off, a **Summary** button appears on the person's row. It opens a one-page summary in a new tab: details, both sets of scores and the gaps, the staff member's response, the HR outcome and the dates of each step. Press **Print / Save PDF** to print it or save it as a PDF.



Performance Appraisal Summary

Print / Save PDF

Annual appraisal 2026 · Annual · All Roles

Employee & Review Details

Employee	Daniel Lim	**Staff no.**	D1002
Position	Sales Advisor	**Department**	—
Outlet	Demo Mall Kuala Lumpur	**Appraiser**	Priya Nair

Scores & Gap Analysis

4	4	0.44
Self avg	Appraiser avg	Alignment index

Item	Self	Appraiser	Gap
Increase my monthly sales	4	4	0
Keep customer feedback scores high	5	4	+1
Job Knowledge & Quality of Work	4	4	0
Productivity, Planning & Time Management	4	4	0
Initiative & Problem-Solving	3	4	-1
Communication & Teamwork	4	4	0
Customer / Stakeholder Focus	5	4	+1
Integrity, Discipline & Compliance	4	4	0
Adaptability & Learning Agility	3	4	-1

The alignment index is the average distance between the two sets of scores. 0 means they match on every item.

APPRAISAL

Staff grades, departments and outlets

For: HR

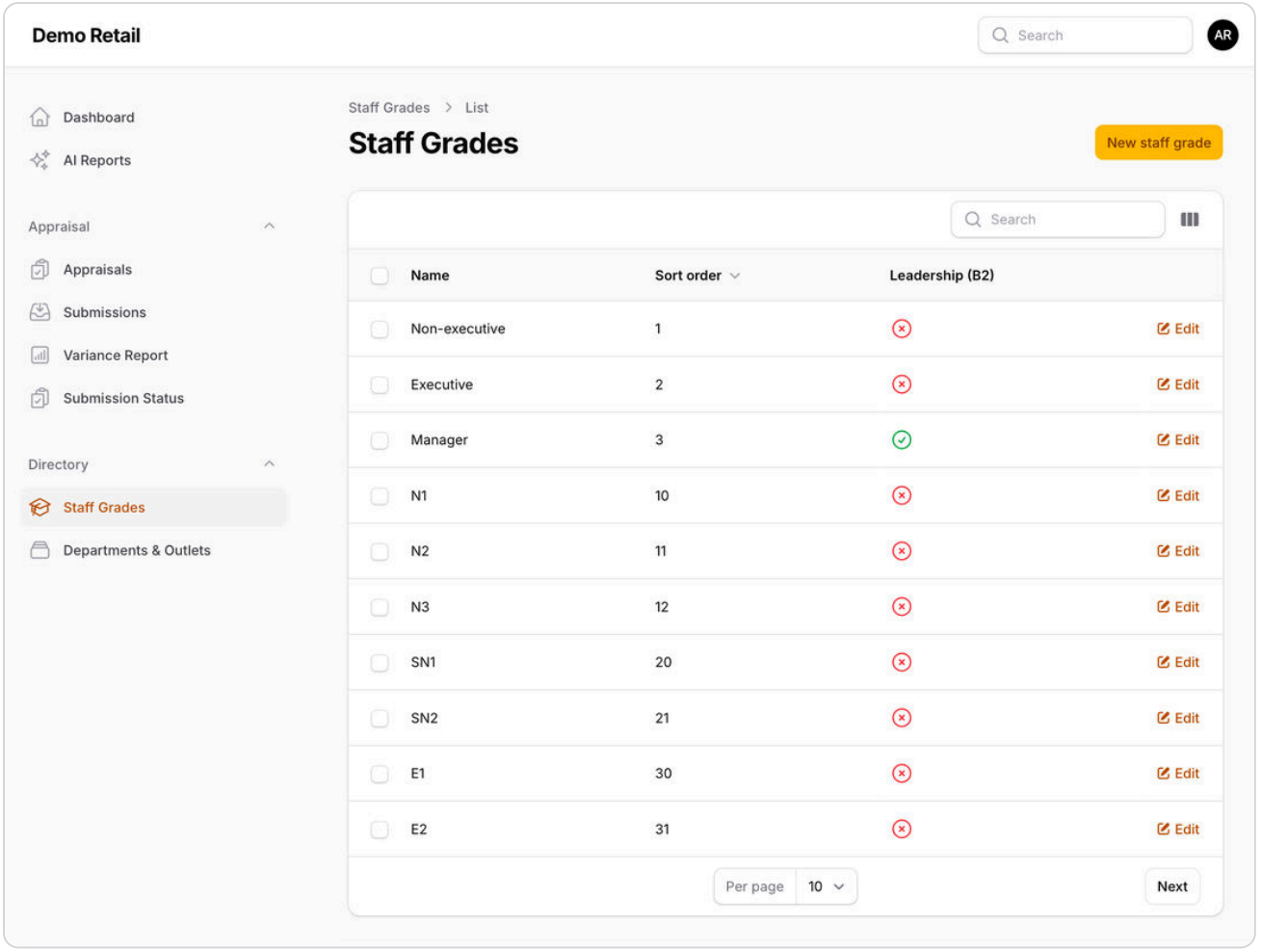
These two lists, under **Directory** in the menu, feed the drop-downs staff see on **Confirm your details**.

Staff grades

A staff grade decides whether a person also rates the 5 leadership behaviours (part B2) on top of the 7 core ones.

1. Press **Staff Grades**, then **New staff grade**, or **Edit** on an existing one.
2. Give it a **Name** and a **Sort order** (the order it appears in the drop-down).
3. Switch on **Can view leadership competencies (B2)** for supervisor and manager grades.
4. Save.

A tick in the **Leadership (B2)** column shows which grades have it switched on.



Departments and outlets

Staff pick their department (if they work at headquarters) or outlet (if they work at an outlet) from this list.

1. Press **Departments & Outlets**, then **New department / outlet**.
2. Choose the **Type** (Department or Outlet), type the **Name** and a **Sort order**.
3. Save. Use **Edit** or **Delete** on a row to change or remove one.

