

Tracking Performance

1. Once Performance Contracts have been developed, tracking can commence. Performance Tracking begins with the employee submitting a Performance Assessment for review by their line manager. The employee will begin by clicking on "Contract (Track)" in the "Performance" module page.

Musina Makhado Special Ec...

The screenshot shows the 'Performance' module page. At the top, there is a header with the name 'Musina Makhado Special Ec...'. Below this is a circular icon with a red play button symbol, followed by the title 'Performance' and the subtitle 'Individual performance development and tracking'. A navigation bar contains four tabs: 'Profile', 'Contract (Develop)', 'Contract (Track)', and 'Development Plan'. The 'Contract (Track)' tab is highlighted with a red border. Below the navigation bar, there are two main sections. The first section is titled 'Performance Reporting Period 2023/24 - bi-annually' and has the subtitle 'Selected Performance cycle'. The second section is titled 'Actionable' and has the subtitle 'Performance contract & personal development plan status for 2023'.

2. For each task and indicator, the employee will click on "Track".

The screenshot shows a dashboard for 'Musina Makhado Special Ec...'. On the left is a navigation menu with categories like Home, Modules, Management, and Support. The main content area displays three KPI sections:

- Clean offices** (50%): KPI 'Effective and efficient cleaning services' (Satisfaction score of line manager on cleanliness of offices) with a 'Track' button.
- Maintain offices** (50%): KPI 'Effective and efficient maintenance of offices' (Level of satisfaction of line manager with maintenance provided) with a 'Track' button.
- Secretarial Duties** (KPA Score: 0.00%, KPA Weighting: 75%):
 - KPI 'Keep record of all documents' (Efficient records keeping) with a 'Track' button.
 - KPI 'Record meeting minutes' (Efficient meeting minutes management) with a 'Track' button.

At the bottom, it states 'Cleaning and maintaining offices tasks weighting: 100%'.

3. The employee will then rate their performance, on a scale of 1-5 by selecting the appropriate number of stars.

The screenshot shows the 'Demo User' performance tracking page for 'Effective and efficient cleaning services' (2023, 1st Half, APPROVED). The page includes:

- KPA: 25%** for 'Cleaning and maintaining offices'.
- Task: 50%** for 'Clean offices'.
- Indicator: 100%** for 'Effective and efficient cleaning services'.
- Measure:** Satisfaction score of line manager on cleanliness of offices.
- Target Type:** %
- Target Description:** Progress in development of South site.
- Strategy Indicator:** Progress in development of South site.

The 'Targets and Actuals' table shows:

Period	Rating	Actual	Employee	Comment
Quarter 1	1-5 ?	★★★★★		
Quarter 2	1-5 ?	★★★★★		
Totals	%	%		

Below the table is an 'Attachment Upload' section with a 'Choose File' button and an 'Upload' button. At the bottom is a 'Timeline' section for 'Comments & Attachments'.

4. Click "Update" to save changes, and the upload any supporting attachments. Once completed, click on "Track" to return to the "Contract (Track)" page.

strategix.exe Musina Makhado Special Ec... Setup Demo User

Demo User
Effective and efficient cleaning services 2023 1st Half APPROVED Track

KPA: 25%
Cleaning and maintaining offices

Task: 50%
Clean offices

Indicator: 100%
Effective and efficient cleaning services

Measure: Satisfaction score of line manager on cleanliness of offices
Target Type: %
Target Description:
Strategy Indicator: Progress in development of South site

100 of 100 %
Indicator Status

Period	Rating	Actual	Employee	Comment
Quarter 1	1-5 ?	★★★★★		
Quarter 2	1-5 ?	★★★★★		
Totals	% 100	% 100		

Update

Attachment Upload
Supporting files

comment...

Choose File No file chosen

Upload

Timeline
Comments & Attachments

5. The employee will repeat these steps until all the tasks and indicators in the performance contract is completed. Once done, click on "Finalize and Submit". This will save the Performance Assessment and send an email to the line manager notifying them that an employee has completed their Performance Assessment.

Reports

Approvals

rt

Policies

Know How

Contacts

KPA's weighting total: 100%

Preliminary Score

Submit your inputs for review to your manager.

Finalize & Submit

Comments
Updates and attachments

New

6. From the line managers perspective, they can review any pending Performance Assessments by going to the "Performance" module page and clicking on "Contract

(Track)".

Musina Makhado Special Ec...



Performance

Individual performance development and tracking

[Profile](#)

[Contract \(Develop\)](#)

[Contract \(Track\)](#)

[Development Plan](#)

Performance Reporting Period 2023/24 - bi-annually

Selected Performance cycle

Actionable

Performance contract & personal development plan status for 2023

7. Then click on "My people".



Performance

Individual performance development and tracking

[Profile](#)

[Contract \(Develop\)](#)

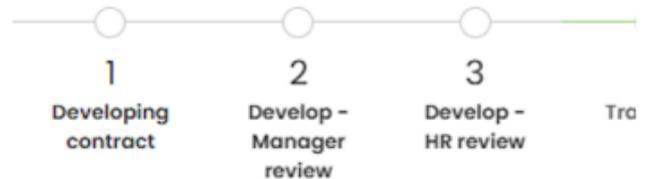
[Contract \(Track\)](#)

[Development Plan](#)

[My Contract](#)

[My People](#)

[My HR](#)



1st Half [APPROVED]

Compliance Leadership

KPA Score: 45.00%

KPA Weighting: 10%

8. The line manager will then be able to see all Performance Assessments pending approval. Click on "Review" to begin.

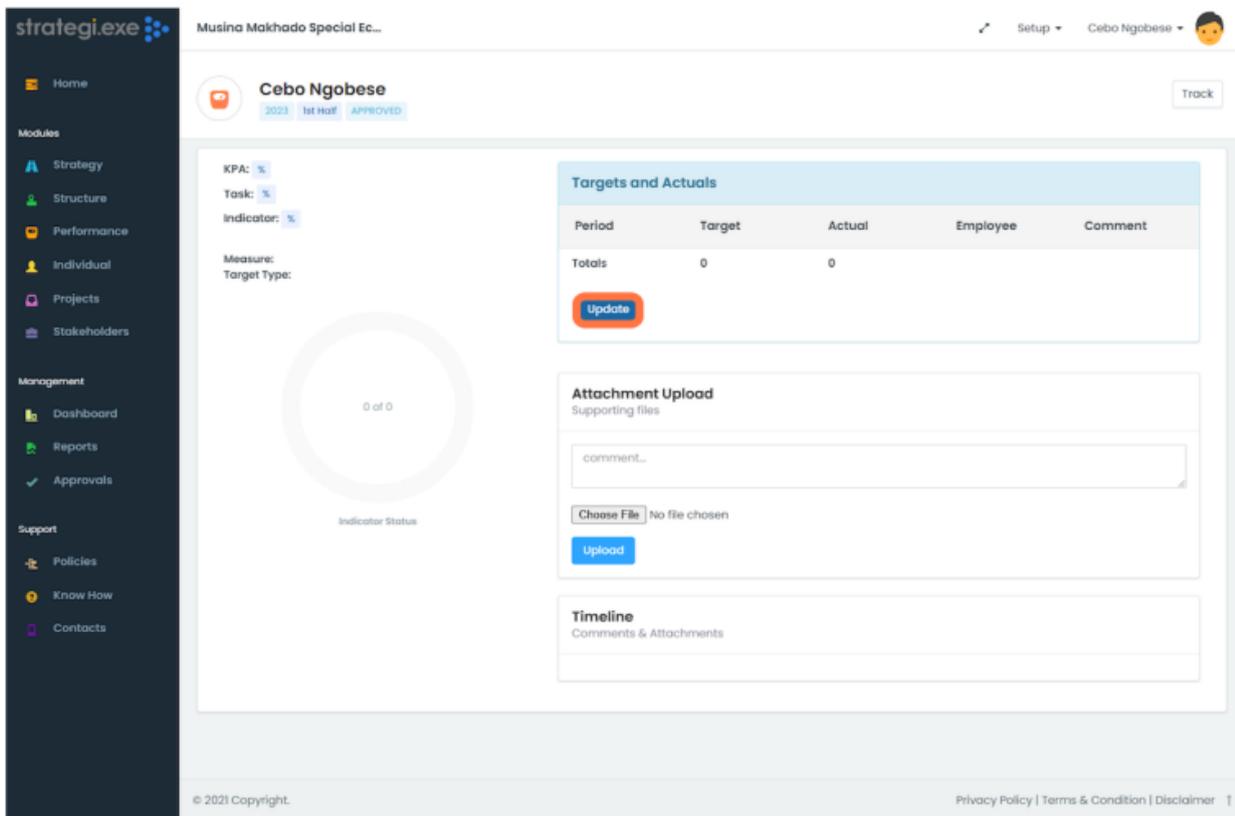
	Status	
	1st Half : APPROVED	View
1	1st Half : TRACKING: MANAGER REVIEW	Review
ia.com	1st Half : DEVELOPING	View

9. The line manager will then add their own assessment for each task and indicator, by clicking on "View" on the relevant tasks and indicators.

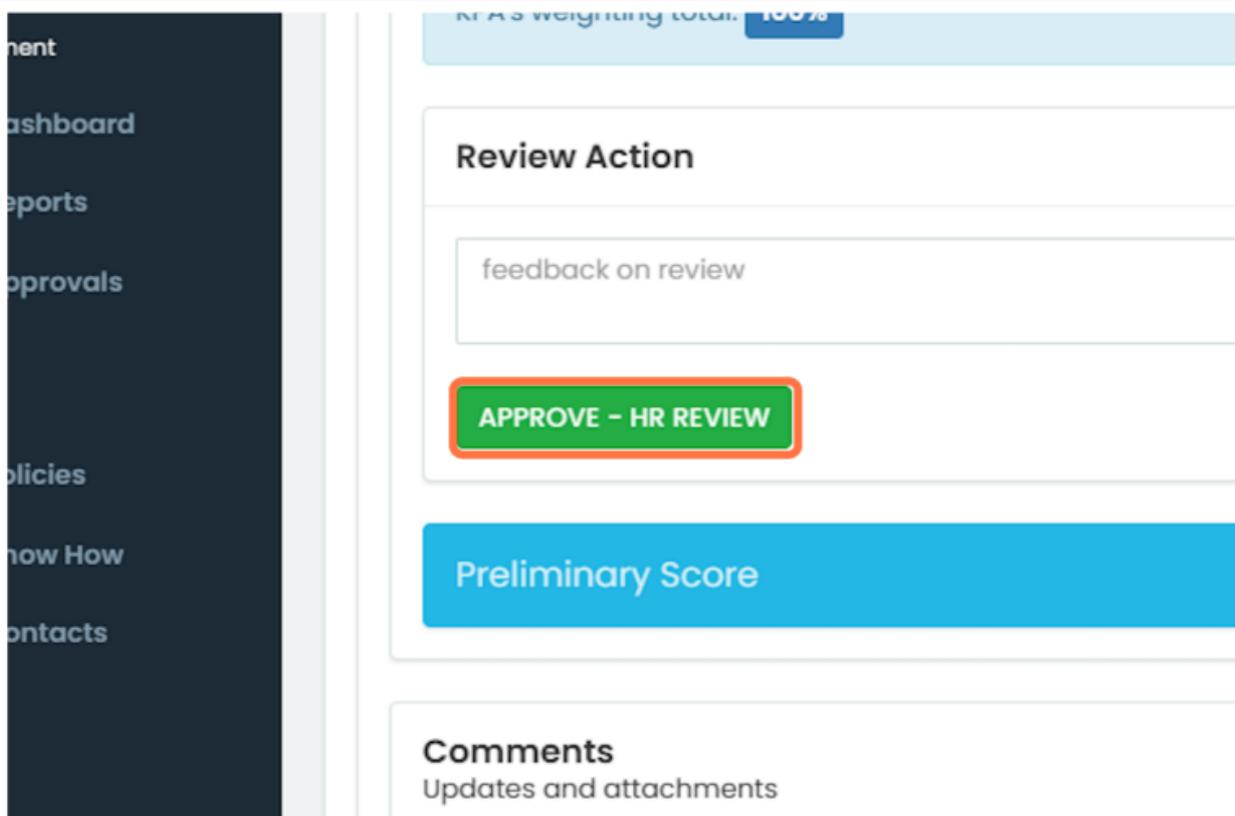


Frequency	Target	Status	Score	Weight
Quarterly	Rating %	View 	100.00%	10
			100.00%	10

10. Similarly to the employee, the line manager will then rate the employees performance on a scale of 1-5. Once completed, click "Update" to save changes and then "Track" to return to the previous page.

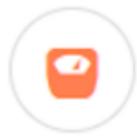


- The line manager will repeat the above steps until Performance Assessments for all the tasks and indicators have been completed. Once done, the line manager will "Approve - HR Review" to save changes and send the Performance Assessment to the HR partner for review. The HR partner will be notified that an employees Performance Assessment is ready for review. It is important to note that the line managers assessment of the employee will be considered the final rating for that employees performance.



- From the HR partners perspective, they can review all pending Performance Assessments by going to the "Performance" module and clicking on "Contract (Track)" and then "My

HR".



Performance

Individual performance development and tracking

[Profile](#) [Contract \(Develop\)](#) [Contract \(Track\)](#) [Development Plan](#)

[My Contract](#) [My People](#) [My HR](#)

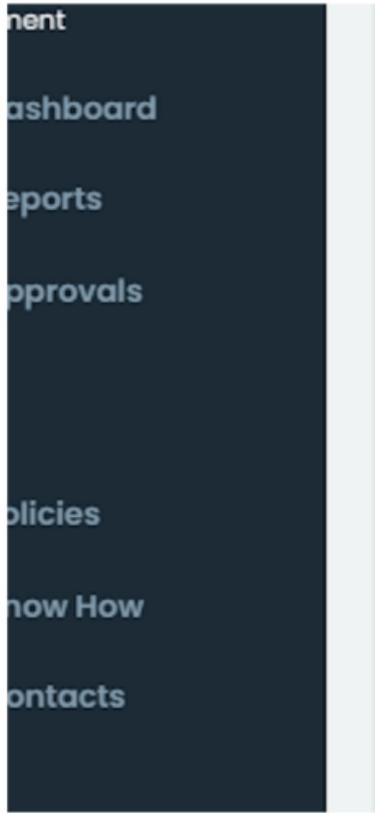
Name	Title	HR
Cebo Ngobese	CEO	Ce
Demo User	Admin Assistant	Ce

13. Then click on "Review" next to the pending Performance Assessment.

status	
1st Half : APPROVED	View
1st Half : TRACKING: HR REVIEW	Review

14. The HR partner can then review the Performance Assessment, and either Approve or Decline it. The HR partner is not able to make any changes to the Performance Assessment so if they decline it, they will be required to provide comments as to why. This will then be sent back to the line manager so they can amend the Performance Assessment.
- Once the HR partner approves the Performance Assessment, the next performance cycle

will commence.



Review Action

This is acceptable

APPROVE

DECLINE

Preliminary Score

Comments

Revision #1

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