



## **1. Introduction**

### **1.1 Background**

With 360 Now the whole process is run on line for ease of use and security. The system is event driven – each step triggers the next and email prompts are sent out at each stage. Whilst there are a number of actions to be carried out, it is always very clear therefore what stage events are at.

### **1.2 Types of 360Now User**

Users can be on the System in one of more of the following capacities:

- Administrator – The Administrator can add Users to 360Now and administer the organisation's use of 360Now.
- Appraisee – A User who is having an Appraisal carried out.
- Appraiser – A User who is completing an Appraisal for another User.
- Approver – A User who is approving the Appraisers and results for another User.

### **1.3 Appraisals**

We have a number of competency based Appraisals for you to choose from. If you have not been provided with a sample report from these please let us know. These include c. 20 – 45 questions about the Appraisee. You can amend these to fit your own requirements. The final report when opened in PDF gives:

- Strengths and weaknesses - five questions where the Appraisee received the highest and lowest average scores.
- Mark by question by tier as follows – manager, peer, report (as long as there are sufficient numbers in each tier to prevent an individual's responses being identified).
- Averages by competency.
- Spread of results shown over laid on question responses.
- Competency spider graph summaries – by section and by manager, peer, report and overall average.
- Ability to add comments, such as agreed personal development objectives, post closure of Appraisal.

## **2. Administrator Running the System**

Once added to 360Now as an Administrator you will receive an email with your log in details. You can then log in and administer your organization's use of 360Now.

### **2.1 Viewing, Copying and Editing Appraisals**

**View Appraisals** – You can view the Appraisals available to your organisation in the format which people completing them will see them.

**Edit Appraisals** – You can make amendments to Appraisals.

**Copy Appraisals** – You can duplicate Appraisals as a basis for creating a new Appraisal.

**Additional Appraisals** – We have a number of Appraisals available. We have provided you with access to those we feel most appropriate to your organisation – but if your requirements are different please let us know and we can give you access to other Appraisals.

### **2.2 Adding Users**

At any time you can add Users by selecting Add User and adding:

- Their email (Username).
- Name.
- An Approver (optional) – this is a manager or person from HR who will approve the list of people to receive.
- Selecting an Appraisal for them.

<p>We strongly recommend that the results are reviewed by an Approver prior to release to the Appraisee and then discussed with the Appraisee before they are released to the Appraisee.</p>
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When you add a User you can choose whether to start their Appraisal straight away or at a later date.

Additional Users can be added at any time. Additional Users can also be given administration capability which allows them to add other Users and assist in administration of the System.

## **2.3 Starting Appraisals**

Appraisals can be started in one of two ways:

- When a User is added to 360Now check the “Send Immediately” option under “Appraisal” heading.
- At any time by following the “Send to existing Users” link.

## **2.4 Adding additional Appraisers or deleting Appraisers whilst Appraisal in progress**

Whilst an Appraisal is in progress you can add additional Appraisers at any time by going to “Find User” and locating that Appraisee. Once you have done this you have options of adding additional Appraisers or deleting any Appraisers who have not yet completed the Appraisal. Once an Appraiser has completed an Appraisal their input cannot be removed (for privacy reasons we do not hold details of how a particular individual) completed an Appraisal against their personal data).

## **2.5 Closing Appraisals**

Once started, Appraisals close in the following ways:

- The Appraisee and all of the Appraisers complete the Appraisal.
- The time for completion of the Appraisal has expired (this is normally set at 21 days).
- The Administrator closes the Appraisal by finding the User details and clicking “Close Appraisal”.

## **2.6 Changes to Organisation Details**

By following the “Company / Organisation Information” link on their log in page, Administrators can also edit information and settings for their organization such as

- Organisation name.
- How often system reminders will be sent.
- How levels of Appraisers are labeled (manager, peer, report or other).

## **3. Running Appraisals**

**3.1 Adding of Appraisers by Appraisee** - Once any Appraisal is started, Appraisees receive an email asking them to fill in their list of Appraisers. It is recommended that they add a minimum of 2 each of Managers, Peers and Reports – although they could do this as two levels of 3 people. Once they have added these and sent the list for Approval this moves to the next step.

**3.2 Approval of Appraisers** - At this stage the Approver is asked to approve the list of Appraisees. (This is an optional step, depending on how the System is set up by the HR – but we recommend it so they can give a quick check to how this has been set up by the Appraisee.)

**3.3 Completion by all Appraisers (and Appraisee)** - Participants (Appraisers and Appraisee) each receive an email asking them to complete the Appraisal.

**3.4 Approval of Results Before Appraisee sees them** - Once completed, HR or Manager can see the results before the Appraisee does.

**3.5 Review of Results by Appraisee** – The results are then released to the Appraisee – who can review and save as a PDF.

**3.6 Time to Complete** - Appraisals generally take about 5 minutes to set up and 10 minutes for each Appraiser to complete.

**3.7 System email Reminders** – If people with actions to carry out (such as setting up their Appraisal or approving another User's Appraisers) do not carry this action out then they will receive email reminders to do this. The intervals at which these are sent can be changed in the "Company / Organisation Information" area but if they are not changed are normally set at every 4 days.

## **4. Action Status**

At any time any User can log into 360Now using their Username (their email address) and their password and see what the status is. If there are any outstanding actions required by them they will be prompted and reminded by email. When the User logs in actions will clearly be flagged under "Actions required by you".

## **5. Completed Appraisals**

Once completed and Approved, Appraisals can be viewed by the Administrator, any Approver for that User and the Appraisee themselves. They can also be downloaded into PDF where richer data analysis is available.