

# Electronic Staff Record

## Performance Management Plans

This functionality enables organisations to set, agree and review objectives agreed by a manager and employee. All within a specified performance period. As the Performance Management Plan concludes an appraisal can then take place. This function can also be used during probation period for new starters and unsuccessful pay progression meeting.

### What are the Benefits?

#### Time Saving

- Performance Management Plans can be shared with all employees at the same time.
- Managers and employees can update objectives.

#### Efficiency

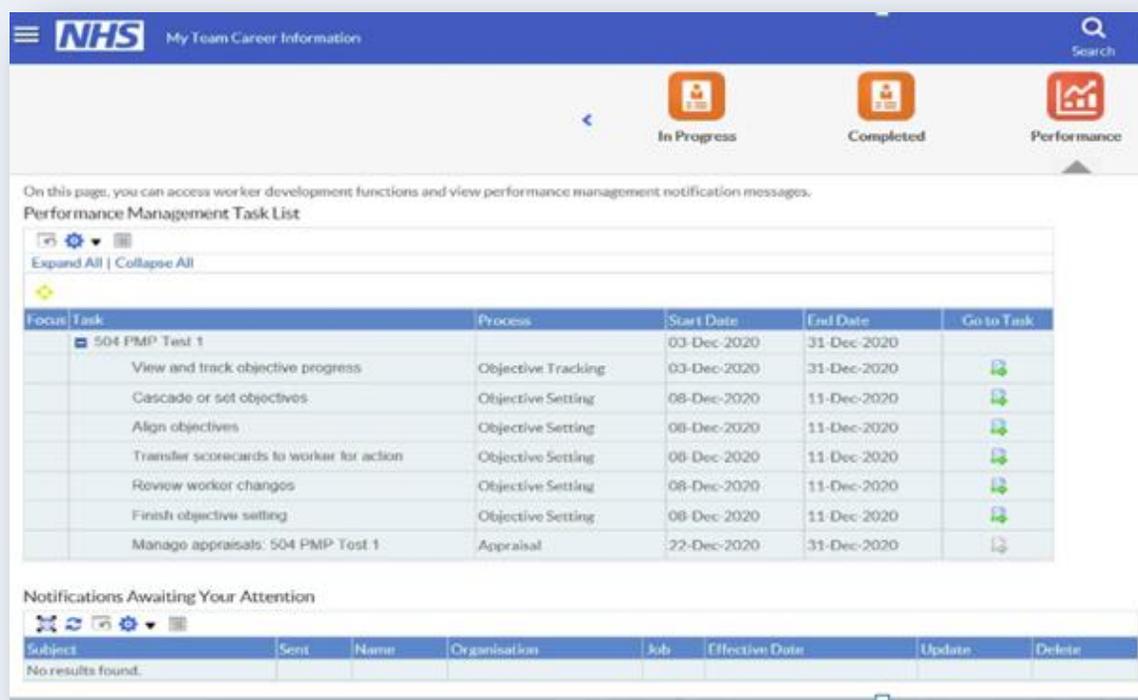
- Organisation objectives can be viewed by all employees.
- Organisations can have more than one Performance Plan available.

#### Individualised Performance Management Plan

- Individual objectives can be created by the manager and the employee.

#### Reporting and Monitoring

- Once the objectives have been agreed, they can be tracked through the Workforce Hierarchy.
- ESR BI Reporting functionality is available .



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## Performance Management Plans

### Employee's Role

- Notified when the Performance Management Plan is available.
- Search the objective library.
- Add specific role and personal objective to the Performance Management Plan.
- View and track objectives progress.
- Update Performance Management Plan, it is then immediately visible for the manager to view.



### Manager's Role

- Initiate the Performance Management Plan Tasks (known as objectives).
- Search objective library and share with the employee.
- Agree objectives with the employee.
- View and track objectives progress.
- Update Performance Management Plan, it is then immediately visible for the employee to view.



### PMP's Administrator's Role

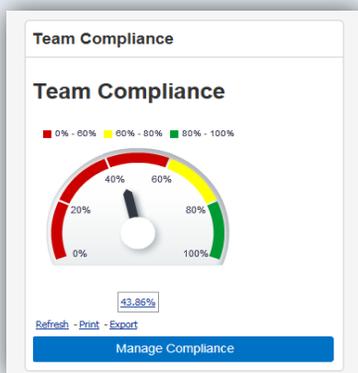
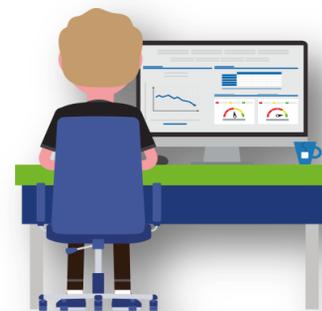
- You can change Supervisors during the Performance management Plan Period.
- You can add new employees to the Performance Management Plan.
- You can extend objective settings.
- You can refresh and remove scorecards (objectives tasks).
- You can reopen the Appraisal after deadline.
- You can transfer objectives from one Performance Management Plan to another.

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### Workforce/Reporting Team

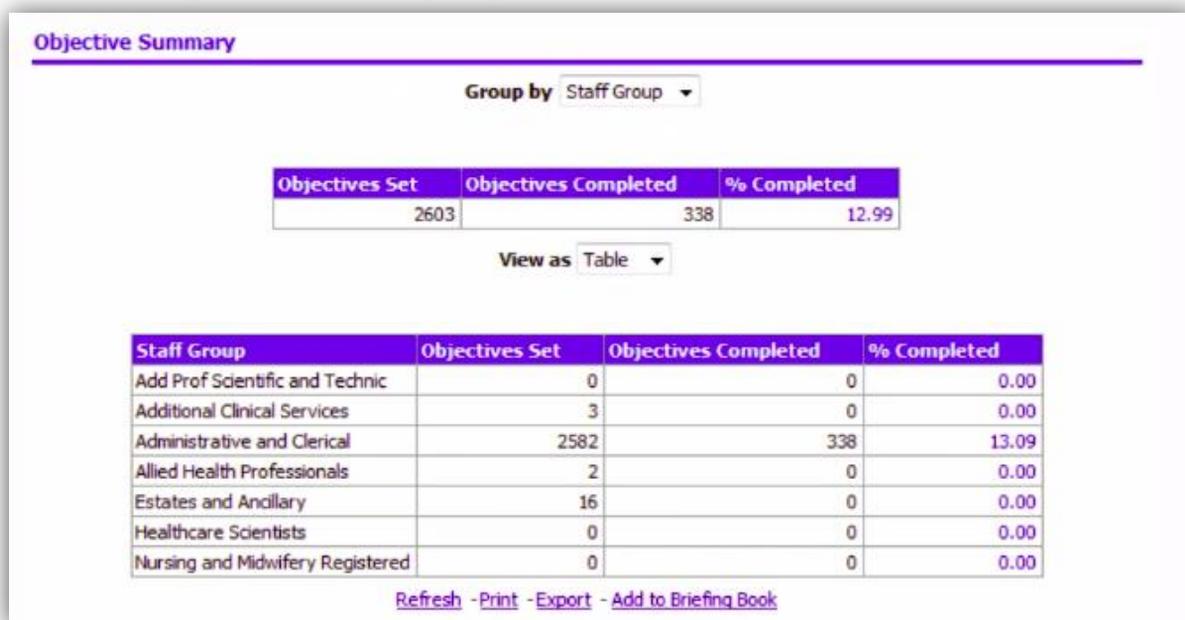
- Functionality is available on ESR BI.
- Appraisal and PMP dashboard enables an Organisation to report on Objectives, Questionnaires, Scorecards and Appraisals within the Performance Management Plan.



### Easy Monitoring for Managers

- The manager can use the Manager Self Service Dashboard to monitor compliance objectives through the Team Compliance Portlet

### ESR BI – Objective Summary Report



This BI analysis provides totals for objective sets, objectives completed and percentages of objectives completed. Grouping is available by organisational levels 1-13, staff group, role and pay scales.

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## Performance Management Plans

### Organisational Requirements

For Performance Management Plans to be implemented in ESR, Manager and Employee Self Service functionality has to be implemented. All Performance Management Plans are dependent on a robust and up to date workforce hierarchy.



### Points to consider

- ✓ Does your Organisation have organisational/business objectives. If not, managers will be required to create objectives.
- ✓ Will your Performance Management Plan include an Appraisal.
- ✓ Do you have different appraisals for different staff groups.
- ✓ Do you have an Appraisal process in place with agreed documentation i.e. set questions, branding.
- ✓ What is your current process for supporting new starters and their probation period.
- ✓ What is your current process for unsuccessful pay progression.



### Next steps?

Firstly, you need to contact your NHS ESR Functional Account Manager who can help advise on your options and how to progress. Your NHS ESR Functional Account Manager details can be found on the ESR Hub. Details for your regional contacts can be found via the links below:-

- [London](#)
- [South of England](#)
- [Midlands and East of England](#)
- [North of England](#)
- [Wales.](#)



Before you get started, why not access our helpful guides on our support sites by clicking [here](#).