This guide is created to assist you to use electronic performance evaluation report (e-PER) depending on your role in the process of evaluating the performance of staff.
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Introducing the e-PER

The electronic performance evaluation report (e-PER) is a tool created to record the performance management of staff in UNRWA. This particular tool is to be used by senior area staff grade sixteen and above and all international staff Agency-wide. The policies for area and international staff are PD A/23 and I/112.6 respectively.

The tool follows the process as defined in the policy through the three main stages, namely:

**Stage I: Cycle Begins**

Determining individual objectives and professional development plans, where the staff member and immediate supervisor:

- Jointly define the work objectives for the staff member for the coming period.
  - Review the dimensions and standards for the measurement of performance.
- Review and plan for staff development opportunities in accordance with the staff development policy (PD I/113.1).

The staff member is required to note the following:

- Career Development: this section allows the staff member to list their personal career objectives, noting acquired skills and experience as well development needs to achieve the objectives.
- UNRWA post interests: The section also allows the staff member to indicate their interest for a next (area of) assignment if the opportunity arises, along with a timeframe (e.g. within 1, 2, or 3 years).

**Stage II: Mid-Point Review**

- A brief but formal review of performance between immediate supervisor and staff member to review work performance and progress towards objectives and results.

**Stage III: End of Cycle Review**

- At the end of the performance cycle, a full formal review of performance takes place during a further discussion between the staff member and his/her immediate supervisor in consultation with the second supervisor.
  - Self-appraisal
  - Immediate supervisor’s comments on the self-appraisal
  - End-of-cycle performance review
  - Overall Performance Rating
  - Comments by the Field
  - Comments by the HQ/Programme
  - Performance review discussion between the staff member and immediate supervisor
  - Final sign off by the staff member

The e-PER uses Internet Explorer V.9 and above

This manual is intended for use with e-PER version 4.0
Performance Management Life Cycle

Stage I
- ePer performance cycle initiated
- Report initiated
- SM creates work plan, details career and development objectives
  - Approved by IS?
    - yes
      - Completed work plan: Phase I completed
    - no
      - No discussed

Stage II
- Mid-term review and discussion
- Work plan valid?
  - yes
    - Completed work plan: Phase I completed
  - no
    - Work-plan and objectives updated & agreed

Stage III
- Staff member self appraisal
- Can be returned for review
- Dimension ratings, and draft overall rating
- Comment by IS, and first end of cycle discussion
  - Second supervisor comment and overall rating
  - Can be returned for review
- Field Director Comments
- Field
- Staff member Field or HQ
- HQ Director Comments
- IS and SM discuss completed ePer
- SM completes final comments
  - Rebuttal?
    - yes
      - Staff member has one month to make a submission
    - no
      - Cycle completes
Starting to use the e-PER

The e-PER is accessed via both UNRWA intranet and internet using the following URL address:

Intranet – inside the agency: http://unrwa-web-09/pm

Internet – outside the agency: https://intranet.unrwa.org/pm

You will be automatically logged into the system (your name will be in the top right of the screen) and your supervisors names and relation will always appear in the header, and you will have access to all the operations available to your role in the e-PER.

When you login, the system will direct you to the My Report page

2- Login My report page

The following TABS are available:

3- Menu

The following is the key tasks for each link:

Home – will take you to the opening screen

MY Report – will take you to your own report

My Tasks – will take you to your open tasks in various roles

My Staff Reports – will allow you to see the reports of staff in your reporting chain

Reports – will show the reports - if you have permissions

OTI – will allow to manage an opportunity to improve for your staff members

On the header in all pages, you can see your reporting line:

Note: if you noticed that the reporting line is wrong you can contact the PM focal point in your duty station.
Stage I: Report Initiation

Once Human Resources has authorised the start of a new reporting cycle it will be available for you to select from the list. From the menu go to “My Report” and the following screen will appear:

4- REPORT INITIATION

The SMs have to submit their work plan in order to go through the ePer process.

You will see both active and closed reports. You can have two active reports available – one for the last period (in the process of being completed) and one for the current period (a new report).

To start this process, click on the first column (Your name) in blue colour, and you will be transferred to the following page:
5 - REPORT INITIATED

Complete the Staff development, Career development and UNRWA post interests sections

Fill at least three Objectives and their Related Actions and Success Criteria.

After completing, click on the save button at the bottom, and then the Submit button.

The Report is initiated now; this form will be sent to your supervisor to take action, either to approve or to reject. If the report was rejected, it will be returned to you and you will need to complete the requested actions and resubmit it. Once approved there are no further actions required until the mid-term, although the e-PER remains available for view.

The immediate supervisor will receive an e-mail advising them that one of his/her staff has created his/her work plan:
6- APPROVE EPER PLAN BY IS

There are two more ways that the supervisor can access the SM report other than the email:

- The My Tasks page which will display any pending tasks the supervisor has to do

7- MY TASKS PAGE

- My Staff Report page which will display the list of the SM according to the search criteria and the supervisor can click on the name of the desired SM to display his report and take any required action if available

8- MY STAFF REPORT PAGE

The immediate supervisor will reviews the work plan and various objectives of the staff member.
Staff Member Work Plan

Staff development:
Description of at least one learning activity to be carried out in the performance period to develop skills and competencies for current and future functions.

Career development:
Describe your future career aspirations indicating previously acquired skills and competencies as well as development needs.

LMWA post interests:
Indicate the next grad level you would like to move up to in LMWA and highlight the opportunities areas (Soft Skills, grad level, Key-Hub, Team Roles).

Competencies:
I have reviewed my section’s work plan from my supervisor: Yes / No

Instructions:
- Please list at least three objectives and their related actions and success criteria before trying to submit.
- The maximum size limit is 1500 characters with spaces for the objectives, related actions and success criteria.

Objective 1:

Objective 2:

Objective 3:

Objective 4:

Objective 5:

Objective 6:

9- IS REVIEW, APPROVE / RETURN THE WORK PLAN
The immediate supervisor can approve the work plan, or return it to the staff member if he/she wishes some changes to be made. Comments are required by the immediate supervisor if the plan is returned to the staff member.
If the SM changed the returned comments and resubmit it, or the work plan wasn’t returned from the beginning, the immediate supervisor should click on the approve button and the e-PER will be approved.
The staff member will receive an e-mail as follows depending on whether the plan was approved or requires amendment:

12- APPROVAL EMAIL

This completes Stage I.

Stage II: Mid-Point Review
At the Mid-point of the performance cycle the immediate supervisor will receive a notification to complete the mid-point review.

13- MID-POINT REVIEW PAGE
The immediate supervisor will complete a brief but formal review of performance with the staff member. The immediate supervisor should consult the second supervisor and, if appropriate, any technical supervisor(s) or other stakeholders. This discussion is primarily intended to encourage the process of continuous dialogue between immediate supervisor and staff member that should take place throughout the year concerning work performance and progress towards objectives and results.

In the e-PER the immediate supervisor should note the highlights of the mid-term discussion and include comments on changes to the objectives, indicators and development requirements since they were agreed at the beginning of the period e.g. unplanned activities or where performance needs to be improved.

If the objectives are changed the staff member will receive a notification:

14- CHANGE WORK PLAN NOTIFICATION

15- MID-POINT REVIEW SUBMITTED

At the end of Stage II, the immediate supervisor will again ‘Complete’ the section confirming that discussion and agreement between him/her and the staff member on work performance and progress towards performance targets has taken place.
Once completed the staff member will be notified accordingly:

From: PerformanceMgmt  
To:  
Cc:  
Subject: Performance Management System

Dear Staff Member,
Your mid-term-review has been completed.

Best Regards,
Performance Mgmt Team

16- MID-POINT REVIEW NOTIFICATION
Stage III: End of Cycle Review

Staff Member Self – Appraisal

From the My Task page, click on the Self-Appraisal (SM) link

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<th>Task Title</th>
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<th>Report Owner</th>
<th>Task Date</th>
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<td>Self Appraisal (SM)</td>
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<td>14-Mar-2015 01:28:00 AM</td>
</tr>
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17 - SELF-APPRaisal TASK

The ePer will open on the self-appraisal step

The staff member completes the self-appraisal as shown below, and submits it to their immediate supervisor. He/she has the option of saving a draft if he/she does not wish to complete it in one session.

18 - SELF-APPRaisal PAGE
Once completed the e-PER is submitted:

**Staff Member Self-Appraisal/Assessment**

*This section is for the staff member to complete and should be a brief statement of main accomplishments during the review period, specifically in relation to the goals and objectives established in the work plan.*

**Staff development Activities:**

Fill your comment on the undertaken staff development activities for this period.

**Self-Appraisal/Assessment Comment:**

Data has been saved & submitted

19 - SELF-APPRAISAL SUBMITTED

**Immediate Supervisor Comments on Self-Appraisal & Year-end Performance Review**

In this step immediate supervisor is able to comment on the self-appraisal.

20 - SUPERVISOR YEAR-END NOTIFICATION

![Tasks](image)

21 - YEAR-END TASK
Should the immediate supervisor consider that the staff member has not presented the full picture of his/her performance then the IS can return it to the staff member to improve the self-appraisal.

22- RETURN SELF-APPRAISAL

The staff member will be notified accordingly:

23- RETURN SELF-APPRAISAL NOTIFICATION

The staff member can make changes and resubmit.

The immediate supervisor next comments on the self-appraisal, and discusses this with the staff member. After that discussion (a date is required) the immediate supervisor will rate the staff member against the dimensions (comments required for falls short...) and propose an overall rating for the performance cycle.
Overall Performance Rating

Once the immediate supervisor has submitted the end of year review, a new task will be send to the second supervisor (if exist in the reporting line):

25- SECOND SUPERVISOR OVERALL RATING NOTIFICATION
26 - SECOND SUPERVISOR OVERALL RATING TASK

The second supervisor will complete comments and award an overall rating. Note that the second supervisor is required to complete the date that the review was discussed with the immediate supervisor.

27 - OVERALL RATING PAGE

The second supervisor can return the e-PER to the immediate supervisor if they consider the ratings are not justified by comments (or vice versa).
Field Director Comments
The Field Director is required to enter comments on the performance of their staff. He/she may return the report back through the process if he/she considers the ratings and comments to be inconsistent.
HQ Dept. Head Comments
As for the previous steps the HQ Director will receive notification his/her task.

29- HQ DEPT. HEAD COMMENTS NOTIFICATION

The HQ Dept. Head is to complete comments on the performance of the staff member. The Director may return the report back through the process if he/she considers the ratings and comments to be in consistent.

30- HQ DEPT. HEAD OVERALL RATING COMMENTS

Otherwise the comments are saved.

31- HQ DEPT. HEAD OVERALL RATING COMMENTS SUBMITTED
Performance Discussion IS/SM
Once the immediate supervisor receive the task of (Performance discussion), he/she is required to finish the overall performance discussion with the staff member.

32- IS PERFORMANCE DISCUSSION NOTIFICATION

A date of the discussion is required.

33- PERFORMANCE DISCUSSION PAGE
Staff Member Closure Comments
Following the performance review discussion with the immediate supervisor the staff member has the opportunity to make final comments.

Dear [Name],

Action is required to be completed by you on the ePer for (Task Title). [Task Title] has completed the task (IS_Approval_Comments), and you are now requested to complete the step (Staff_Final_Comments). Please click the link below to complete this task.

Performance Report - New Task

Best Regards,

Performance Management System Team

34- SM closure notification

35- SM closure and comments page

Throughout the performance cycle the staff member and immediate supervisor have been involved in regular dialogue. Any comments or ratings in the report should not be unexpected, and they are to be explained fully to the staff member. Any disagreement by the staff member of the report contents should be settled by first the immediate supervisor, and then the second supervisor.
If the staff member considers they have been unjustifiably rated “performance falls short of expectations” they have the opportunity to seek a formal review of the rating. Further, the immediate and second supervisors are responsible for ensuring the comments support the award of any rating within the report – either with respect to dimensions or the overall rating. If the staff member considers them to be inconsistent he or she should discuss this first with the immediate supervisor and then the second supervisor. If the matter cannot be resolved informally the staff member may seek a review of the comments insofar as they relate to the ratings awarded in the same manner as described above.

The report is then closed.
The Staff Member and the HR focal point will receive a notification that the e-PER is closed.
Stage IV: Opportunity to Improve (OTI)

Once the Supervisors have an obligation to their staff to bring to their attention any areas where improvement is required and provide them with the opportunity to improve. The process for managing underperformance has two major parts: the informal improvement process and the formal improvement process. Additional resources are available on the HRD intranet site, and HR staff members are to be involved with these processes.

Informal OTI

Having identified the underperformance in one or more of the objectives the immediate supervisor needs to discuss the matter with the staff member. Specific examples need to be presented to the staff member that highlight how performance is considered to have deteriorated, and how this varies from the agreed objectives and indicators in the e-PER. The staff member must be given an opportunity to provide an explanation in order to understand the underlying reasons for the decline in performance.

Once immediate supervisor has authorised the start of an informal OTI, it will be available for him/her to select from the list. From the menu go to “OTI” then “OTI Management” And the following screen will appear:

37 - OTI MANAGEMENT PAGE

The immediate supervisor can start the Informal OTI by select the SM from the list and then click on the “Create Informal” button, and then the system will check if its eligible to create informal OTI for the selected SM or not; if no the system will return a message of the reason, if yes, the following page will be shown:
The immediate supervisor has to fill:

- Issued discussed during the meeting with SM.
- Actions for improving the performance of the SM.
- Potential work environment improvements.
- Discussion date with the SM (Not less than two weeks).
- Start date of the informal ORI (not more than two weeks from the discussion date).
- Follow-up discussion date (not in the past, it should be in the coming 90 days).

And then the IS should select one of two available options, either to save draft or to submit.

Note: The System will send an email to the SM informing him/her that he/she is under informal OTI.
Next, the IS should fill at least one progress report through the period of the informal OTI.

The IS can create a progress report by clicking on the “OTI progress report” from the right bottom corner of the informal OTI page, the image below shows the OTI progress report:
Next, after the period of the informal OTI and depend on the performance of the SM, the IS has to decide either to close the informal OTI if he/she satisfied with the SM or to go through the formal OTI if he/she not satisfied with the SM performance.

The following screen shows the IS decision’s option of the informal OTI:
43- OTI INFORMAL DECISION

Formal OTI
If the IS has the option to select “Go to Formal OTI” then the system will direct him/her to the formal OTI page, the following image shows the formal OTI page:

44- OTI OPEN FORMAL MESSAGE
The immediate supervisor has to fill:

- Issued discussed during the meeting with SM.
- Actions for improving the performance of the SM.
- Potential work environment improvements.
- Discussion date with the SM (Not less than two weeks).
- Start date of the informal ORI (not more than two weeks from the discussion date).
- Follow-up discussion date (not in the past, it should be in the coming 90 days).

And then the IS should select one of two available options, either to save draft or to submit.

Once the IS submitted the formal OTI, the system will send email to the SS asking his/her approval on the formal OTI, and both options need a comment to be filled by the SS for the purpose of his/her selection.
Next, after the period of the formal OTI, the IS has the options “Confirmation, Extend formal OTI and Removal from function”, the following image shows the Options to close the formal OTI:

![Options to close the formal OTI](image)

### 46 - OTI Formal Options

Next, once the IS taken his/her decision, the system will ask the SS approval for the selected decision and once the SS approved the IS decision, the system will ask the HQDH approval on the decision.

#### Stage V: Probation Period

**Mid-Term Review**

At the Mid-point of the probation period the IS will receive a notification to complete the mid-point review of the P.P. The IS will complete a brief but formal review of the probation period of the staff member. The IS should consult the second supervisor and, if appropriate, any technical supervisor(s) or other stakeholders. This discussion is primarily intended to encourage the process of continuous dialogue between immediate supervisor and staff member that should take place throughout the year concerning work performance and progress towards objectives and results.

The IS has to select one of the options (Confirmation, Termination, or Continue to year-end review) (Image below shows the mid-term review of the probation period):

![Mid-Term Review of the Probation Period](image)
At the end of mid-term review Stage, the immediate supervisor will again ‘Complete’ the section confirming that discussion and agreement between him/her and the staff member on work performance and progress towards performance targets has taken place.

**Year-End Review**

At the Year-End of the probation period the IS will receive a notification to complete the Year-End review of the P.P.

(The following image shows the probation period at the Year-End stage):

![Probation Period](image)

Once the IS selected one of the available options, the system will send email to the SS asking his/her approval on the taken decision

Once the second supervisor approve the IS decision on the probation period, the HQDH approval is requested to close the cycle of the probation period

**My Staff Members Statuses Report**

If you are a supervisor, you will find the following report in the report page from the menu that displays the reports statuses for the staff members under your supervision

![System's Reports](image)
### 50- MY STAFF MEMBERS STATUSES REPORT

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<th>Functional Title</th>
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## Performance Management Roles and Screens

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<td>Immediate Supervisor Comments on Self-Appraisal &amp; year-end Performance</td>
<td>Read</td>
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<td>Overall Performance Rating</td>
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<td>Staff Member Close Report</td>
<td>Read / Write</td>
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<tr>
<td><strong>Immediate supervisor</strong></td>
<td>Mid-Term Review</td>
<td>Read / Write</td>
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<td><strong>Second Supervisor</strong></td>
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<td>Field Director Comments</td>
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<tr>
<td>HQ Department Head</td>
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<td>Field Director Comments</td>
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<td>HQ. Department Comments</td>
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<th>HR Administrator</th>
<th>All Screens Are Available For him/Her</th>
<th>Read/write</th>
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