

HCM Use Case 08: Performance Evaluation

Description: As opposed to the traditional once-a-year form-filling exercise, WHO’s new generation performance evaluation aims to move away from traditional performance management and toward “performance development”, a process that acknowledges and supports individual talents, performance needs and sense of purpose backed by clear expectations, accountability and ongoing feedback and coaching.

Pre-conditions:

System is running in normal conditions. The User has the required permissions to access the functionality described in the Use Case.

Post conditions:

Staff member’s performance over a pre-defined period is evaluated against established criteria, including goals, objectives, training and development plan, with scheduled opportunities for documented coaching and feedback.

Use case ID	User	HCM	HCM-FR-#	Associated requirements/Comments
UC801: Initiation of performance evaluation				
UC801	User (Staff member) logs into Performance Management portal	System presents evaluation form with pre-populated data, including staff personal details, contract dates, dept/team common objectives System provides fields for entry of specific objectives, competencies, training objectives	HCM-FR-169 HCM-FR-170 HCM-FR-159 HCM-FR-158	Staff and contract data pulled from Core HR Common dept objectives pulled from HCM or potentially SPM Competencies associated with job family pulled from HCM or potentially SPM Evaluation forms must be configurable by WHO for different contractual arrangements, and evaluation types (for example, probationary) System must allow for inclusion of 360-degree review option and the identification of associated reviewers

	User enters objectives, selects competencies, enters training objectives	System provides specific pages for each section (objectives, competencies, training) Minimum entries are required in each category, and maximum number of characters in description fields	HCM-FR-173	Integration with iLearn to allow staff member to select relevant trainings
	User validates data entered	System provides for eSignature System saves data Approval path is triggered System-triggered notification goes to 1 st level supervisor	HCM-FR-179 HCM-FR-165	HCM-FR-171: In the case of transfers, reassignments or promotions of staff during the evaluation period, the system should be agile enough to allow for amendment of performance evaluation parameters
UC801: Staff member's performance evaluation is initiated				
UC802: Validation of performance evaluation content				
	User (1 st level supervisor) clicks on link in system-triggered notification	System opens performance evaluation form completed by staff member		
	User reviews content	System allows user to enter comments in any section of the evaluation Once completed, system notifies staff member and he/she can review comments directly in system System allows supervisor to validate content, and triggers notification to staff member		
UC802: Staff member's performance evaluation content is validated				
UC803: Periodic check-in				
		System triggers check in points at regular intervals during evaluation period		Regularity of check ins can be determined by supervisor and scheduled directly in the system
	User (staff member) clicks on	System provides standard form for completion by user		Online form must be configurable by WHO

	link in system-triggered email notification set for evaluation period check in	(pre-populated with objectives and goals)		
	User completes the form	System triggers notification to 1st level supervisor, including direct link to staff member's performance evaluation process Supervisor has opportunity to make comments on information entered by staff member at check in point Content of exchange between supervisor and supervisee is captured directly in the system	HCM-FR-164	System should allow for the revisiting and updating of objectives and goals as required
UC803: Periodic check-in is scheduled and documented				
UC804: Performance review at end of evaluation period				
		System triggers notification at pre-defined date before completion of evaluation period		
	User (staff member) clicks on link in system-triggered email User completes self-evaluation	System opens staff member's performance evaluation process and presents mandatory fields for completion		Information from check in points throughout the evaluation period are included in the final evaluation form
	User validates information entered	System requires eSignature System-triggered notification goes to Supervisor		
UC804: Performance is self-evaluated by staff member				
UC805: Performance rating and sign off				
	User (Supervisor) clicks on link in system-triggered notification	System opens staff member's performance evaluation process and presents mandatory fields for completion		It is understood that face-to-face conversation takes place between staff member and supervisor

				Rating rationale must be configurable by WHO
	User completes form	<p>System triggers notification to staff member, including direct link to staff member's performance evaluation process</p> <p>Staff member has opportunity to make comments on information entered by supervisor</p> <p>System provides supervisor with option to select a PIP</p> <p>Content of exchange between supervisor and supervisee is captured directly in the system</p>	<p>HCM-FR-166</p> <p>HCM-FR-162</p>	Looking back at past performance should always be done with a future focus
	Supervisor and staff member sign off on evaluation	<p>System requires eSignature</p> <p>System triggers relevant approval workflow, with opportunity for comments, (for example, 2nd level supervisor)</p>	HCM-FR-160	Interface with Core HR, for example, confirmation of appointment, within-grade-increase
UC805: Performance is rated and evaluation signed off				