

## Load Default Rating Scale in Individual Objective

The Load default rating scale in Individual Objective has been released to the system.

In this new type, when creating objective rating score, user doesn't need to add one by one the rating scale per objectives.

### Set up the default rating in Field Lookup

- Login in HR Portal
- Go to Maintenance > Field Lookup > Form Controls
- Select Performance Management in Module field and select value in Default Rating.

Maintenance > Field Lookup List

Field Lookup List >

Record saved

Save

Field Look Up Form Controls

Module: Performance Management

Direct Supervisor Display Label: Rater

Allow whole number in evaluation rating: YES

Required Actual: YES

Allow system to auto retrieve KPI description: YES

Retrieve Competencies/KPIs from Evaluation Template: NO

Default Rating: Proficiency

### Create Individual Objective in Employee Portal:

In the Employee Portal, the employee can load the default rating scale when creating Individual Objective.

- Login in Employee Portal
- Go to Performance Management > Individual Objective
- Click the plus icon to create new Individual Objective.

everything at work

Schedule Leaves Project Tracking Attendance Compensation & Benefits Accountability Personnel Development Performance Management Other Requests Safety and Health

Individual Objectives List >

Search Here

Date Prepared	Status	Period	Effective Year
03/26/2024	Reviewed	Annual	2024
05/06/2024	Reviewed	Regularization	2024
03/26/2024	For Review	Mid Year	2024

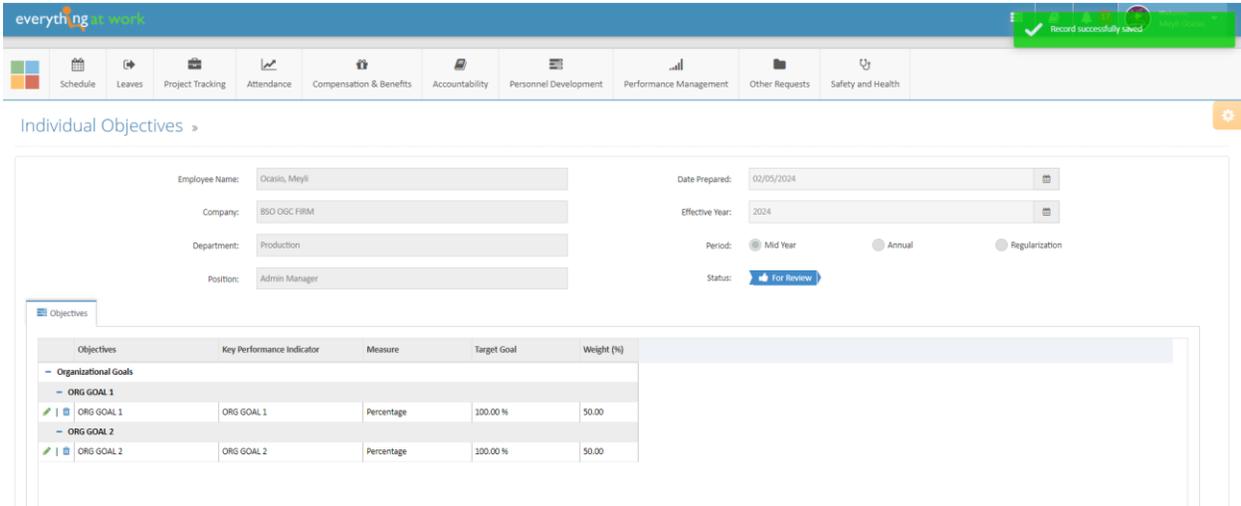
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- Fill out the form
- Click the plus icon to add objectives

Individual Objectives >

- Click the **Load Default Rating Scale** button to load the rating scale.
- Click the **ADD** button to save the objective with default rating scale.

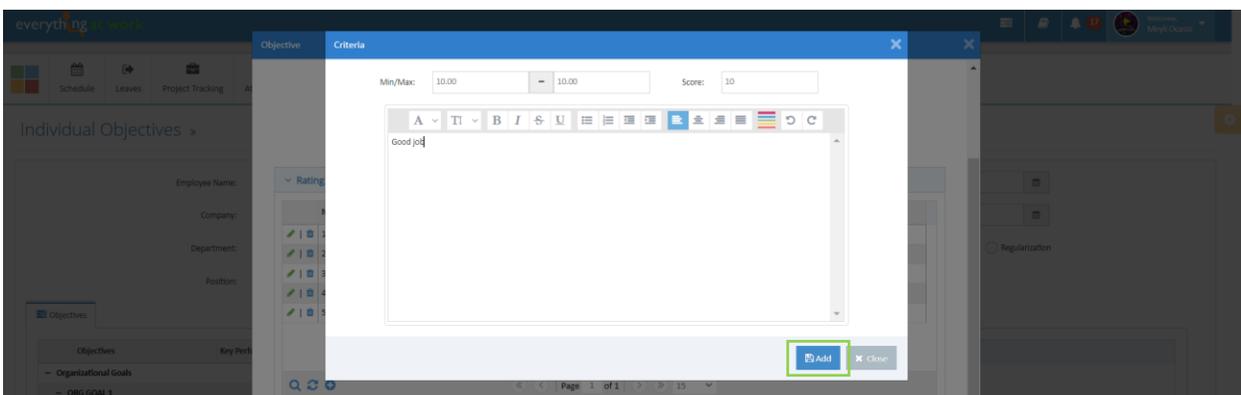
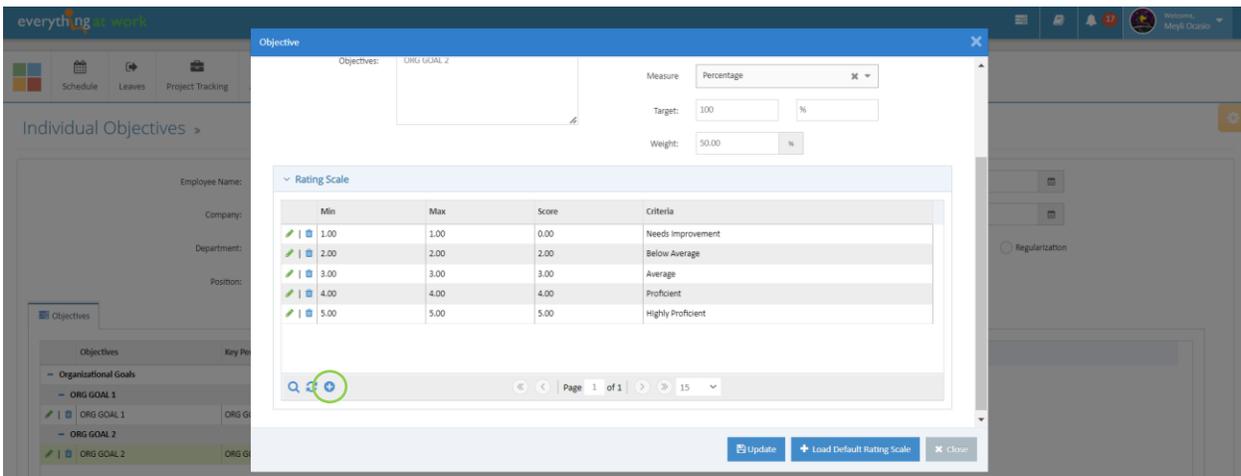
Min	Max	Score	Criteria
1.00	1.00	0.00	Needs Improvement
2.00	2.00	2.00	Below Average
3.00	3.00	3.00	Average
4.00	4.00	4.00	Proficient
5.00	5.00	5.00	Highly Proficient

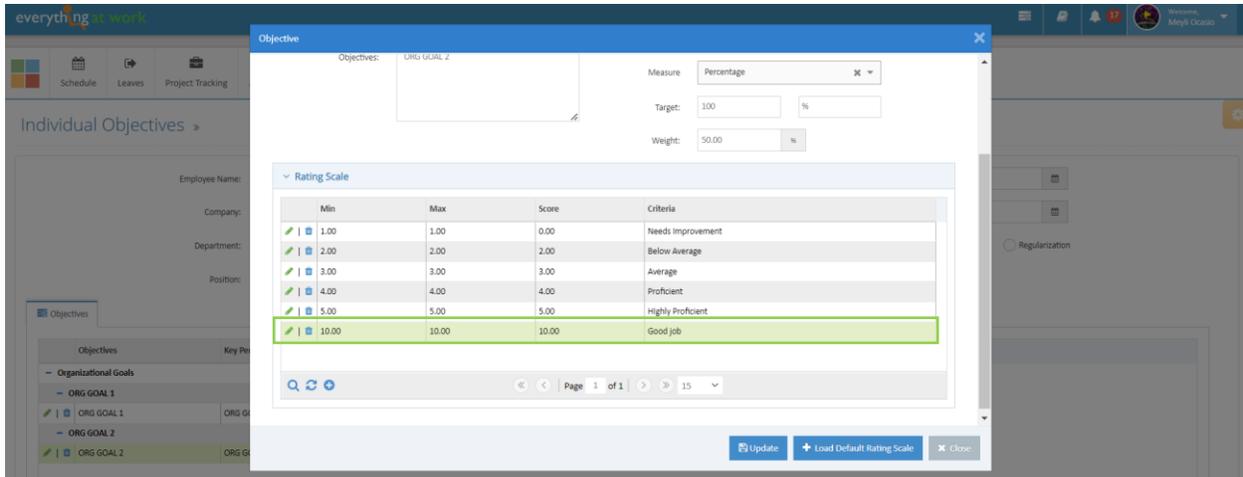


Add, edit and delete the copied rating scale:

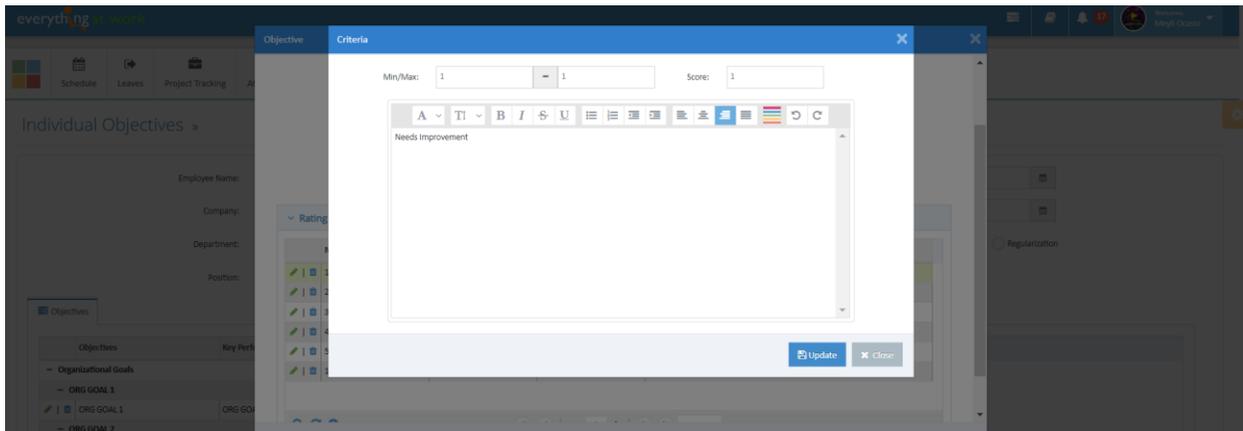
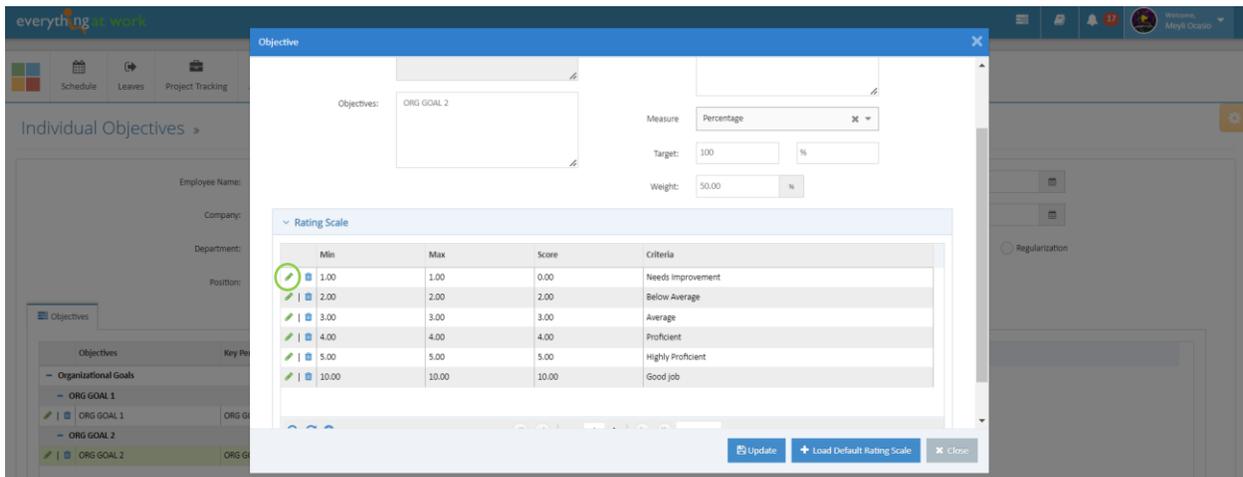
Employee still be able to modify the copied rating scale in Employee Portal.

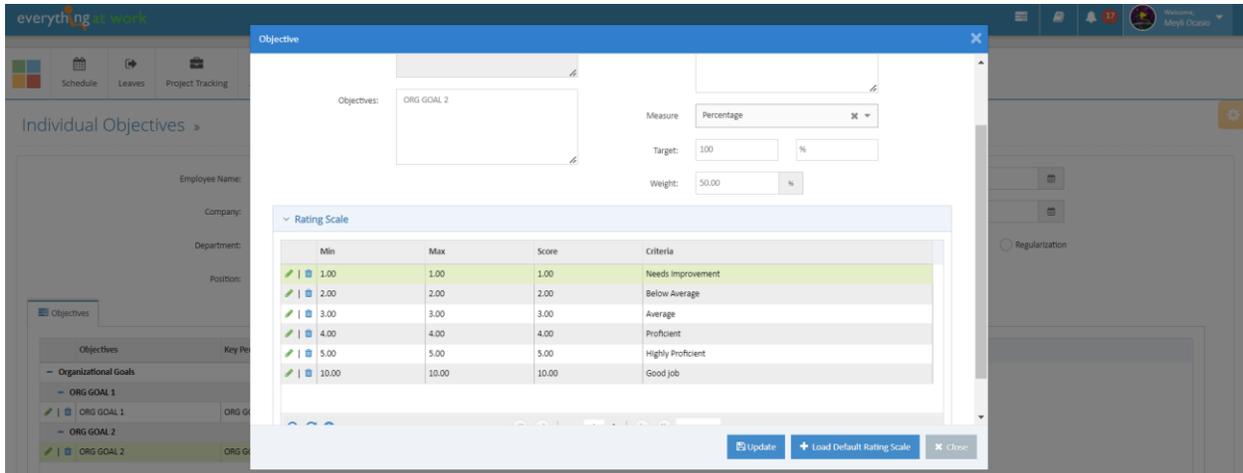
- To add new rating in the copied rating scale:
  - Click the plus icon and add new criteria.



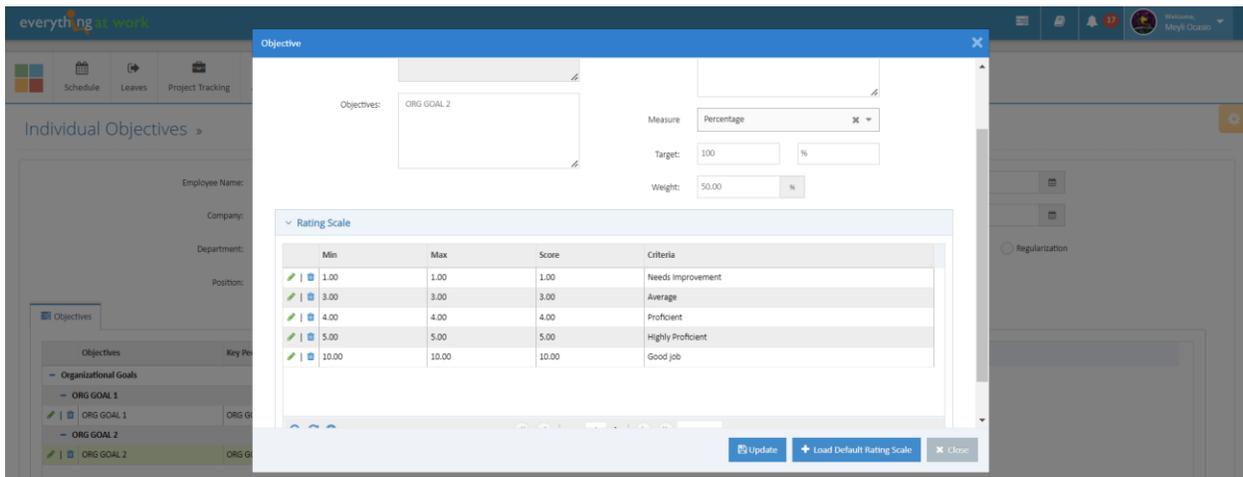
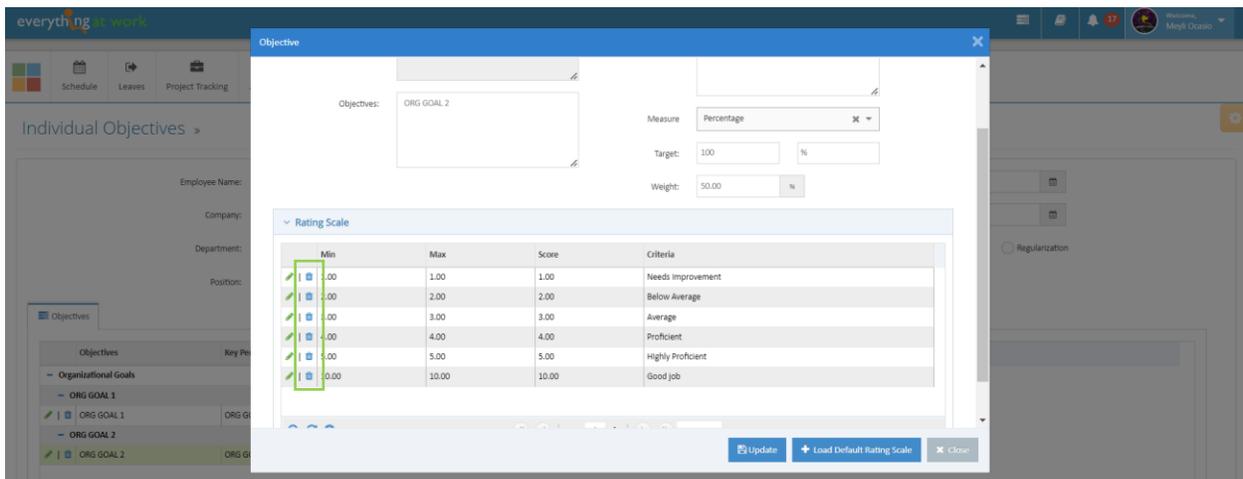


- To edit the rating in the copied rating scale:
  - Click the pencil icon and edit the criteria.





- To delete the rating in the copied rating scale:
  - Click the trash icon.



Mark Reviewed/Approve the Objectives:

In the HR Portal under Performance Management> Individual Objective. The user may approve (Mark reviewed) the Employee’s individual objective and will reflect there the loaded default rating scale.

HR user, may able too to load the default rating scale in the HR Portal.

Employee Name: Ocasio, Meyli  
Company: BSO OGC FIRM  
Department: Production  
Position: Admin Manager  
Date Prepared: 02/05/2024  
Effective Year: 2024  
Period:  Mid Year  Annual  Regularization  
Status: For Review

Objectives	Key Performance Indicator	Measure	Target Goal	Weight (%)
- Organization Goals				
- ORG GOAL 1				
✓	ORG GOAL 1	Percentage	100.00 %	50.00
- ORG GOAL 2				
✓	ORG GOAL 2	Percentage	100.00 %	50.00
Total Weight:				100.00

Goal: ORG GOAL 2  
KPI: Others  
Measure: Percentage  
Target: 100.00 %  
Weight: 50.00 %

Min	Max	Score	Criteria
1.00	1.00	1.00	Needs Improvement
3.00	3.00	3.00	Average
4.00	4.00	4.00	Proficient
5.00	5.00	5.00	Highly Proficient
10.00	10.00	10.00	Good job

Performance Management > Individual Objectives

Individual Objectives >

Record has been successfully processed!

Employee Name: Ocasio, Meyli | Date Prepared: 02/05/2024  
 Company: BSO OGC FIRM | Effective Year: 2024  
 Department: Production | Period:  Mid Year  Annual  Regularization  
 Position: Admin Manager | Status: Reviewed

Objectives	Key Performance Indicator	Measure	Target Goal	Weight (%)
<b>Organization Goals</b>				
<b>ORG GOAL 1</b>				
ORG GOAL 1	ORG GOAL 1	Percentage	100.00 %	50.00
<b>ORG GOAL 2</b>				
ORG GOAL 2	ORG GOAL 2	Percentage	100.00 %	50.00
			<b>Total Weight:</b>	<b>100.00</b>

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### Start the Evaluation in Employee Portal:

After approving the evaluation schedule, employee may evaluate the evaluation and the default rating scale will reflect in the Employee Portal.

- Go to Performance Management > Performance Evaluation
- Select the evaluation.
- Click the pencil icon to open the record.

everything at work

Performance Evaluation >

**Mid Year**  
For the period: 01/01/2024 - 12/31/2024  
Due in: 12/31/2024  
Approved

**Ocasio, Meyli**  
Assistant Manager  
XV24  
Since: 05/14/2017

Score	Details	Status
0	Self Evaluation	Not Started
0	Direct Report Evaluation <i>To be evaluated by Ortega, Belen T</i>	Not Started

Summary

Performance Evaluation >



**Ocasio, Meyli**  
Assistant Manager  
XV24  
Since: 05/14/2017

Appraisal Type: Mid Year  
Evaluator Type: Self Appraisal  
Evaluator: Ocasio, Meyli

For the Period: 01/01/2024 - 12/31/2024  
Progress:  0% Completed  
Status: Reviewed

Save Close

Individual Objectives

Objectives	Criteria	Target Goal	Weight (%)	Employee		
				Review	Actual	Rating
<p>— ORG GOAL 2</p> <p>ORG GOAL 2</p>						
	<p>Average</p> <p>4.00 - 4.00 % - (4.00) Proficient</p> <p>5.00 - 5.00 % - (5.00) Highly Proficient</p>					
	<p>1.00 - 1.00 % - (1.00) Needs Improvement</p> <p>3.00 - 3.00 % - (3.00) Average</p> <p>4.00 - 4.00 % - (4.00) Proficient</p> <p>5.00 - 5.00 % - (5.00) Highly Proficient</p> <p>10.00 - 10.00 % - (10.00) Good job</p>	100.00 % ORG GOAL 2	50.00	Average	Average	3
<b>Total:</b>			<b>100.00</b>			<b>6</b>

View 1 - 2 of 2

Performance Management > Performance Evaluation

Record successfully saved

Performance Evaluation >



**Ocasio, Meyli**  
Assistant Manager  
XV24  
Since: 05/14/2017

Appraisal Type: Mid Year  
Evaluator Type: Self Appraisal  
Evaluator: Ocasio, Meyli

For the Period: 01/01/2024 - 12/31/2024  
Progress:  100% Completed  
Status: For Assessment

Close

Individual Objectives

Objectives	Criteria	Target Goal	Weight (%)	Employee		
				Review	Actual	Rating
<p>— ORG GOAL 2</p> <p>ORG GOAL 2</p>						
	<p>Average</p> <p>4.00 - 4.00 % - (4.00) Proficient</p> <p>5.00 - 5.00 % - (5.00) Highly Proficient</p>					
	<p>1.00 - 1.00 % - (1.00) Needs Improvement</p> <p>3.00 - 3.00 % - (3.00) Average</p> <p>4.00 - 4.00 % - (4.00) Proficient</p> <p>5.00 - 5.00 % - (5.00) Highly Proficient</p> <p>10.00 - 10.00 % - (10.00) Good job</p>	100.00 % ORG GOAL 2	50.00	Average	Average	3
<b>Total:</b>			<b>100.00</b>			<b>6</b>

View 1 - 2 of 2

Performance Evaluation >

**Mid Year**  
For the period: 01/01/2024 - 12/31/2024  
Due in: 12/31/2024  
Approved



**Ocasio, Meyli**  
Assistant Manager  
XV24  
Since: 05/14/2017

Summary Close

Score	Details	Status
118.00	Self Evaluation	<div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <span style="color: green;">Approved</span> </div> <div style="text-align: center;"> <span style="color: blue;">Review</span> </div> <div style="text-align: center;"> <span style="color: blue;">100%</span> Approved                             </div> </div>
0	Direct Report Evaluation <i>To be evaluated by Echevarria, Angel M.</i>	<div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <span style="color: blue;">Start</span> </div> <div style="text-align: center;"> <span style="color: blue;">Review</span> </div> <div style="text-align: center;"> <span style="color: gray;">0%</span> Not Started                             </div> </div>