

Employee appraisals and goals

Human resources and payroll

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Set goals, run review cycles and record each employee's performance rating.

Intermediate · About 30 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Included in the **Enterprise** plan. Contact us if you want to upgrade.

Overview

Appraisals let you review performance on a regular schedule. You set the review period, give each employee goals, collect ratings and keep the history on the employee record.

> The appraisal screens differ slightly between versions of the module. If a name below does not match what you see, search for **Appraisal** and follow the fields on your screen.

Prerequisites

Employees created, with their managers set, and the HR Manager role.

Steps

Create an appraisal cycle

1. Search for **Appraisal Cycle** and click **Add Appraisal Cycle**.
2. Enter a name such as *Mid-year 2026*, and the **Start Date** and **End Date** of the period being reviewed.
3. Choose the **KRA Evaluation Method**: *Automated Based on Goal Progress* or *Manual Rating*.
4. On the **Applicable For** tab, filter by **Branch**, **Department** or **Designation**, and click **Get Employees**. Save.

Create a template

1. Search for **Appraisal Template** and click **Add**.
2. Add the **KRAs** (key result areas), such as *Sales targets* or *Customer service*, and give each a **Weight** so the total is 100%.
3. Add rating criteria if you use them. Save.

Run the cycle

1. In the appraisal cycle, click **Create Appraisals**, then **Start**.
2. Each employee gets an **Appraisal** with the KRAs.
3. The employee writes a **self review**, then the manager records their rating and feedback for each KRA.
4. The system works out the **final score**, by default the average of the goal, feedback and self appraisal scores. Submit once agreed. Templates are linked through the employee's designation.

Goals

1. Search for **Goal** and click **Add Goal**.
2. Enter the goal, the **Employee**, the dates and the **progress** measure.
3. Update the progress during the period, so reviews are based on facts.

Practical example

Every June and December, HR starts an appraisal cycle for the shop. Each manager rates their team on sales, stock accuracy and customer service. Scores of 80% or above are shortlisted for a bonus decision by the owner.

Important notes

- Appraisals are confidential. Limit access to HR and the line manager.
- Discuss the ratings with each employee in person, and keep the outcome with the record.
- Link pay changes to appraisals only through a new salary assignment. See Salary components and structures.

Common mistakes

- KRA weights that do not add up to 100%.
- Rating without goals set at the start of the period.

Next steps

Return to Human resources overview.

Related documentation

- Employees
- Human resources overview