HR DELIVERY / STEP-BY-STEP SERIES

Compensation, Evaluation & Performance

F1

PORTAL
USER GUIDE

Learn to find salary references, compare pay assumptions, prepare evidence-based job evaluations and connect objectives, reviews, ratings and development through a clearly governed performance cycle.

01 PREPARE

02 FOLLOW

03 CHECK

INTRODUCTION

OPEN SOURCE

A practical guide to compensation, evaluation & performance

This guide follows three linked questions: what does the job require, what salary context is relevant, and how will contribution be agreed and reviewed? Keep the evidence for each question clear even when the tools are used together.

The public salary lookup, currency desk and Evalu8 supplied example were inspected directly. Protected salary scenarios, saved evaluations, Objectives Generator and performance records remain source-described. Use the observed examples to learn the sequence, then confirm the private workspace's permissions and controls before working with live employee records.

WHO THIS GUIDE IS FOR

Reward and compensation teams • Job-evaluation practitioners and role owners • Managers conducting performance reviews • HR administrators and finance partners

WHAT YOU CAN DO

01 Find the correct market, role, grade and pay basis

02 Use local-currency and indicative currency comparisons

03 Prepare premiums, team-cost scenarios and salary-guide specifications

04 Describe role facts and evaluate eight factors with supporting evidence

05 Review grades independently and keep reporting context clear

06 Structure objectives, reviews, ratings and development follow-up

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In this guide

Use the chapter pages to find a task. Follow each numbered sequence and check the result before continuing.

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FOREWORD

A note from Dr Phillip

Clear role evidence, explicit salary assumptions and constructive performance conversations make decisions easier to explain and review.

DR PHILLIP

HR Delivery

Reward and performance decisions are easier to explain when the underlying questions are kept clear. Job evaluation examines the demands of the work. Salary references provide context for pay decisions. Performance review considers the contribution made and the support required. Each deserves its own evidence and careful judgement.

This guide helps you use those tools in a connected way. Begin with an accurate role description, record the facts supporting each evaluation factor, and review the resulting grade independently. When looking at salary information, check the market, currency, period and pay basis. A visible number is useful only when its meaning and limitations are understood.

Performance conversations should then translate organisational priorities into clear expectations and practical development. Use the records to preserve evidence, clarify decisions and agree what happens next. The aim is a process that employees and managers can understand and use with confidence. Lama can help you locate resources or arrange specialist support when a complex reward or contribution question needs further discussion.

Proposed wording for Dr Phillip's review

YOUR FIRST POINT OF CONTACT

OPEN SOURCE

Meet Lama

Lama can help you reach the Compensation, Evaluation and Performance Department, locate the right salary or evaluation resource, and arrange specialist support. Tell her whether your question concerns a role grade, a pay comparison, a team-cost scenario or a performance process. Give the country and broad role context, together with the tool or document you need. Avoid personal salary records in a general enquiry; agree an appropriate confidential route when detailed information is required.

ASK LAMA TO HELP WITH

- Salary-reference and scenario support
- Evalu8 method or report guidance
- Performance-process resource access
- Specialist enquiry through Omar’s department

HAVE THESE DETAILS READY

- Country, currency and intended pay basis
- Role title, family and evaluation context
- Purpose: benchmark, grade, scenario or performance
- Specific document, tool or access question

OPEN LAMA’S RECEPTION

hr.delivery

SIGNING IN / STEPS 1–2 OF 5

OPEN SOURCE

Sign in and choose the right workspace

01 Open the correct department entry

Use the portal link in this guide or select the department from All department portals. Check the heading before entering anything.

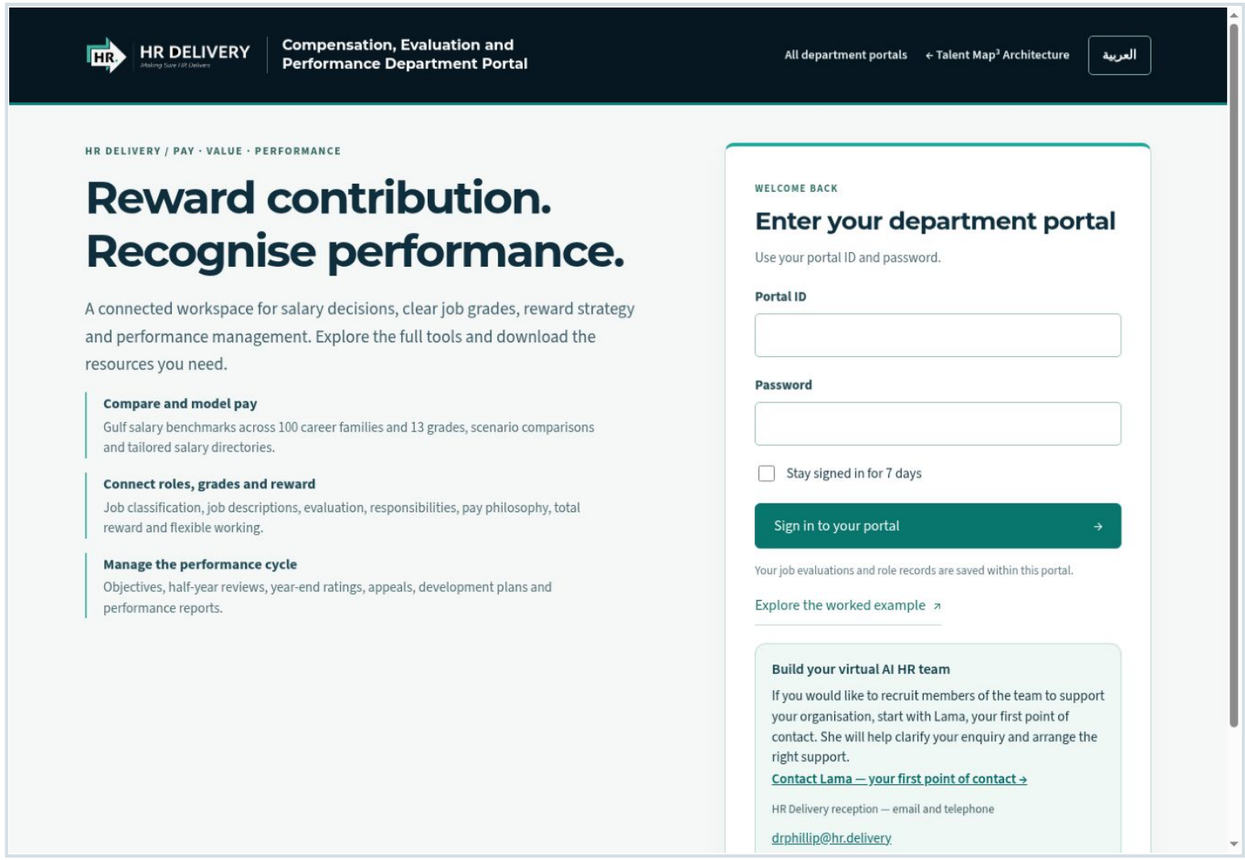
CHECK The sign-in heading identifies the intended department.

02 Enter your issued sign-in details

Enter your organisation’s account identifier in 'Portal ID' and your password in 'Password'. Do not copy credentials into project notes or screenshots.

CHECK Check both entries privately and retain the case supplied by HR Delivery.

CURRENT LIVE SCREEN



Current Compensation, Evaluation & Performance portal sign-in screen. No client records are visible.

SIGNING IN / STEPS 3–4 OF 5

OPEN SOURCE

Sign in and choose the right workspace

03 Choose the session option

'Stay signed in for 7 days' is optional. Use it only on a private device managed under your organisation’s access practices.

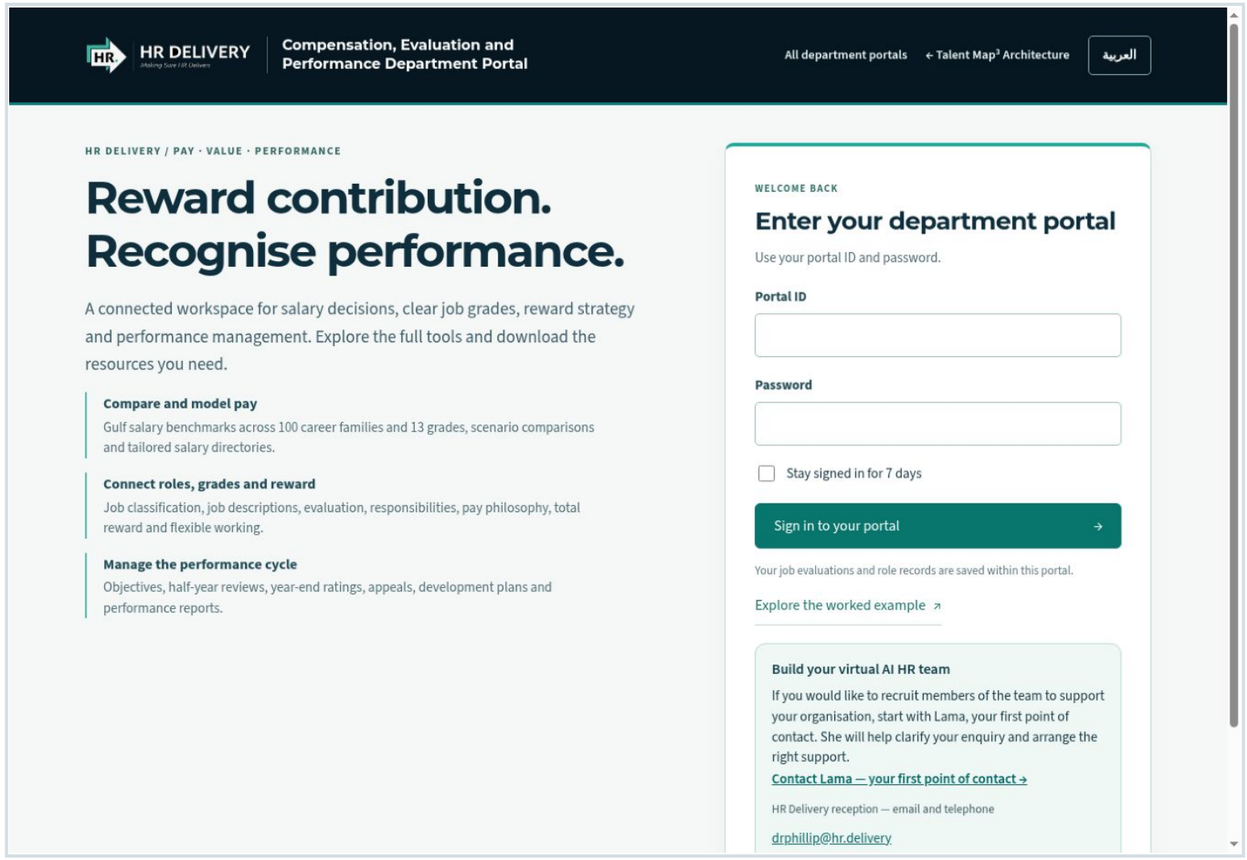
CHECK The checkbox reflects your intended session preference.

04 Select the sign-in control

Select 'Sign in to your portal'. If access is refused, check the department, account and entitlement with Lama.

CHECK After access is accepted, confirm your client/workspace name before opening records.

CURRENT LIVE SCREEN



Current Compensation, Evaluation & Performance portal sign-in screen. No client records are visible.

SIGNING IN / STEPS 5–5 OF 5

OPEN SOURCE

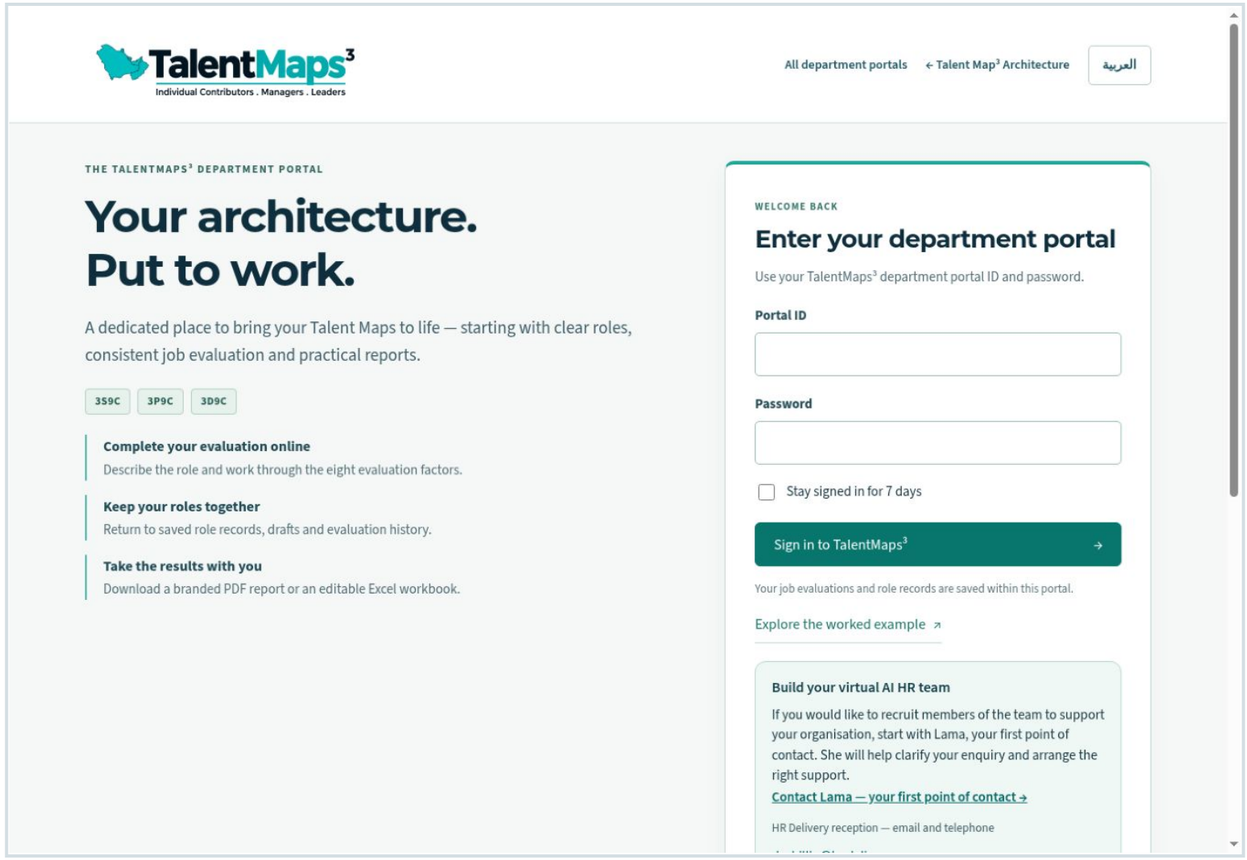
Sign in and choose the right workspace

05 Use the separate TalentMaps³ entry when needed

For the saved-role and job-evaluation workspace, open the TalentMaps³ Department Portal and use its 'Sign in to TalentMaps³' control with the access issued for that workspace.

CHECK The TalentMaps³ heading identifies this separate entry; confirm its entitlement before continuing.

CURRENT LIVE SCREEN



TalentMaps³ has a separate entry and names the saved evaluation/role workflow.

BEFORE YOU START

OPEN SOURCE

Access and working context

01 Use the account issued for your organisation and authorised responsibilities.

02 Department access and access to a private client workspace are separate checks; do not assume another portal's session carries across.

03 Public examples use illustrative records. Replace them only in your authorised workspace.

The current access screen was inspected. The authenticated private workspace was not entered in this review. Public tools and official demonstration screens support the steps identified below; private transactions remain source-described.

YOUR WORKFLOW MAP

How the tasks connect

Follow the sequence for a complete piece of work, or go straight to the chapter you need.

01
Find and interpret salary references
PAGE 011

02
Build pay scenarios and guides
PAGE 024

03
Describe the role for evaluation
PAGE 037

04
Rate, review and retain the evaluation
PAGE 054

05
Run the performance cycle
PAGE 071

06
Resources and specialist support
PAGE 084

Each task: prepare the inputs, follow the numbered steps, then confirm the output and the checks.

01

Find and interpret salary references

Choose the market and role before comparing the numbers.

03 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

FIND AND INTERPRET SALARY REFERENCES / F-01-01

OPEN SOURCE

Find the correct salary band

Locate the salary reference for a specific market and role.

WHO USES THIS Reward analyst or HR manager

BEFORE YOU BEGIN

- Country/market
- Career family and evaluated or reference grade
- Required pay period

WHAT YOU WILL HAVE

- Country/role salary reference
- Source and pay-basis note

CHECK BEFORE YOU FINISH

- Role family and grade match
- Pay basis and period are consistent
- Source edition is recorded

A similar title gives an unexpected range — Check the selected family and grade, then compare responsibilities. Do not select a band solely from title similarity.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Public lookup observed. Figures are policy/planning references and vary by source basis.

FIND AND INTERPRET SALARY REFERENCES / STEPS 1–2 OF 6

OPEN SOURCE

Find the correct salary band

01 Choose a region or market

Use the region controls, Gulf shortcut or 'Find a country across all guides'. Confirm the selection in 'Country / market'; American States is a separate 50-state view.

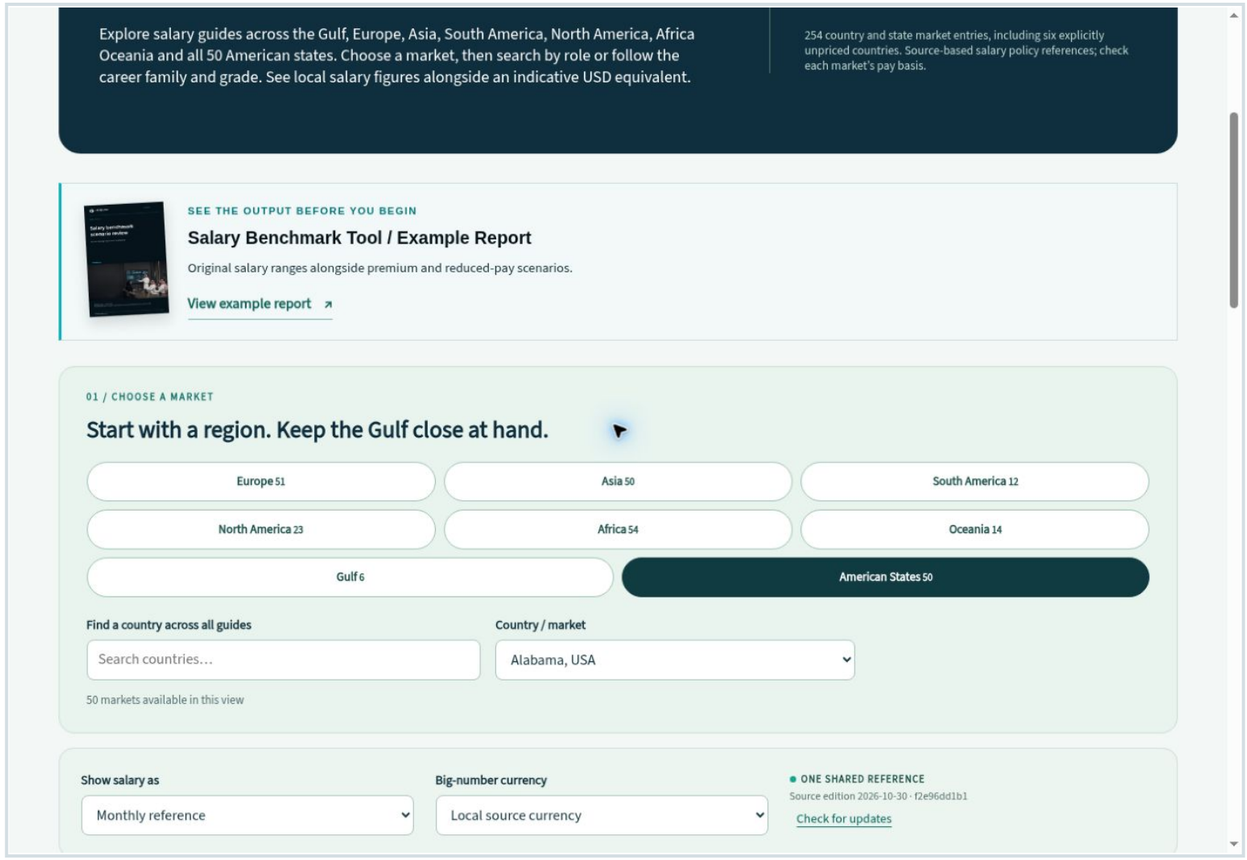
CHECK The intended market is displayed.

02 Set the pay period

Use 'Show salary as' for Monthly reference or Annual equivalent (monthly × 12). Annual conversion does not add allowances or benefits.

CHECK The displayed period matches the comparison you intend.

PRIOR REVIEWED SCREEN



Public salary regions and market search.

FIND AND INTERPRET SALARY REFERENCES / STEPS 3–4 OF 6

OPEN SOURCE

Find the correct salary band

03 Find the role

Use 'Search jobs and career families' or filter Sector / section, Career family and Grade. Similar titles are suggestions; verify the family and grade.

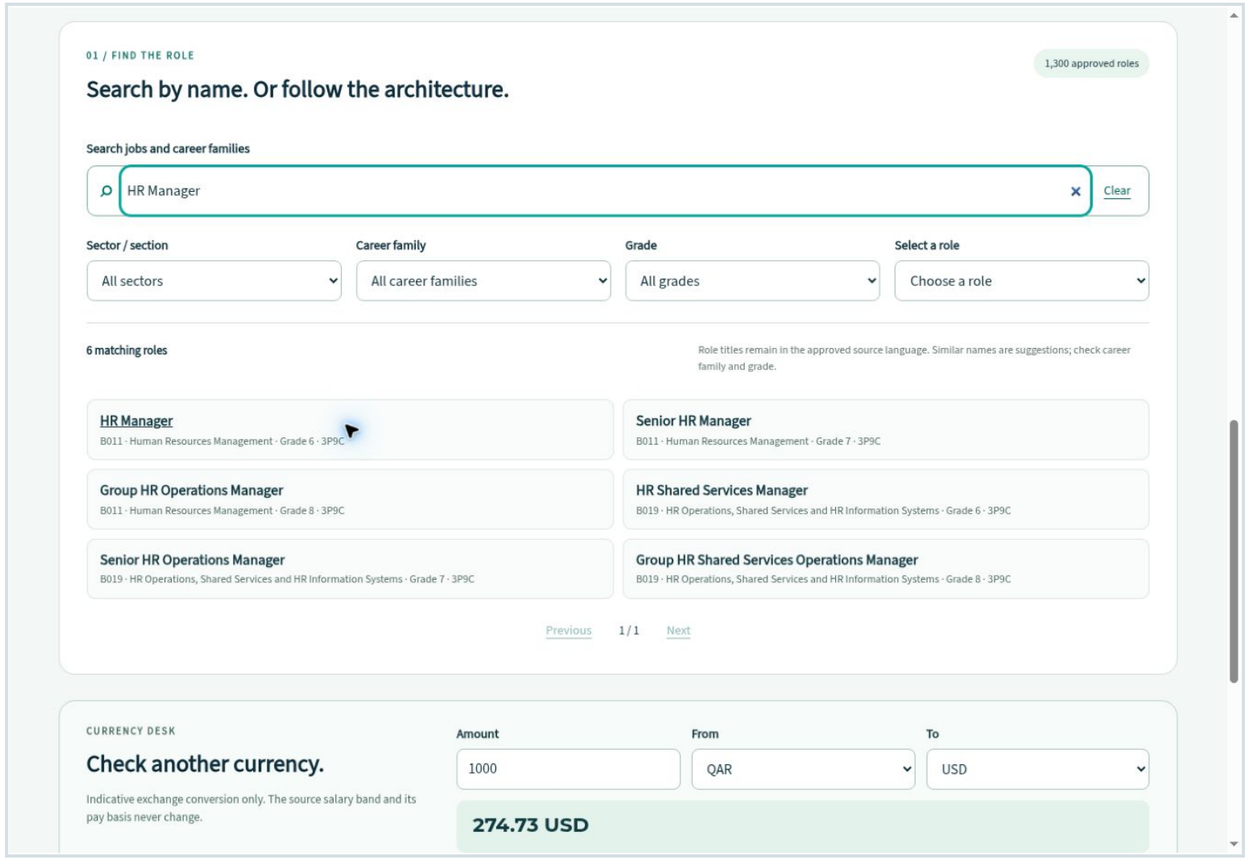
CHECK The role list is relevant to the work.

04 Select the exact role

Choose the role card or Select a role entry. The reviewed example used Qatar, B011 Human Resources Management, Grade 6 HR Manager.

CHECK The result identifies country, family, grade and contribution map.

CURRENT LIVE SCREEN



Current search and selection for HR Manager in Qatar.

FIND AND INTERPRET SALARY REFERENCES / STEPS 5–6 OF 6

OPEN SOURCE

Find the correct salary band

05 Read all three values and the pay basis

Review Low, Midpoint and Maximum together with the basis note. The Qatar example explicitly excludes allowances, benefits and variable pay.

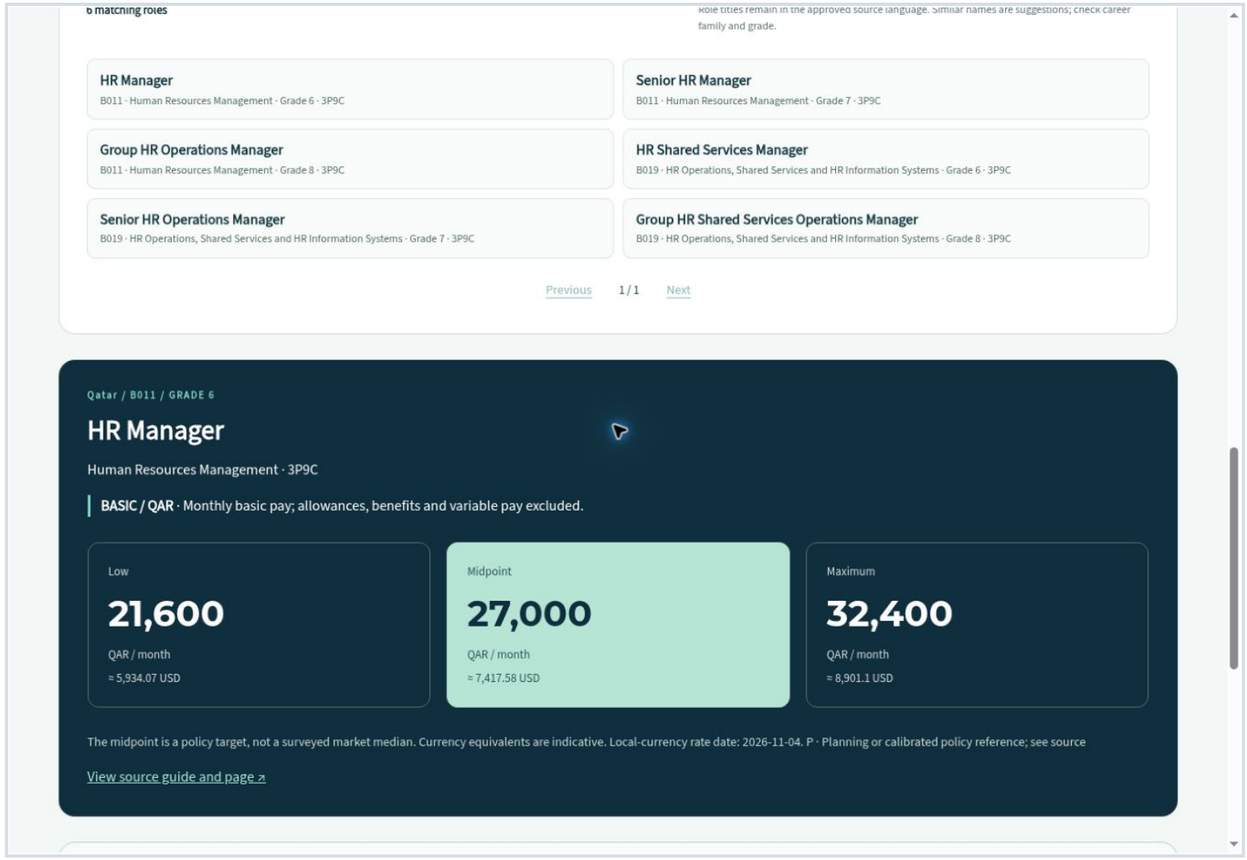
CHECK You understand what is included in the band.

06 Open 'View source guide and page'

Check the source basis and edition before using the figures in a decision. The page states that midpoint is a policy target, not a surveyed market median.

CHECK The comparison carries its source and interpretation limits.

CURRENT LIVE SCREEN



Complete current Qatar Grade 6 HR Manager salary result and basis note.

FIND AND INTERPRET SALARY REFERENCES / F-01-02

OPEN SOURCE

Use currency conversion correctly

Compare currencies without changing the source salary meaning.

WHO USES THIS Reward analyst

BEFORE YOU BEGIN

- Known source amount and currency
- Comparison currency
- Reference date

WHAT YOU WILL HAVE

- Indicative currency comparison

CHECK BEFORE YOU FINISH

- From and To are correct
- Amount uses the intended period
- Rate date and indicative status are retained

A converted figure differs on another date Check the rate date and currency pair. Use the organisation’s adopted rate policy for formal budgets.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The public conversion was exercised with synthetic/reference amounts; no financial transaction was made.

FIND AND INTERPRET SALARY REFERENCES / STEPS 1–2 OF 5

OPEN SOURCE

Use currency conversion correctly

01 Review the local salary basis

Keep the source market, pay basis and period visible. A converted figure remains the same salary reference expressed in another currency.

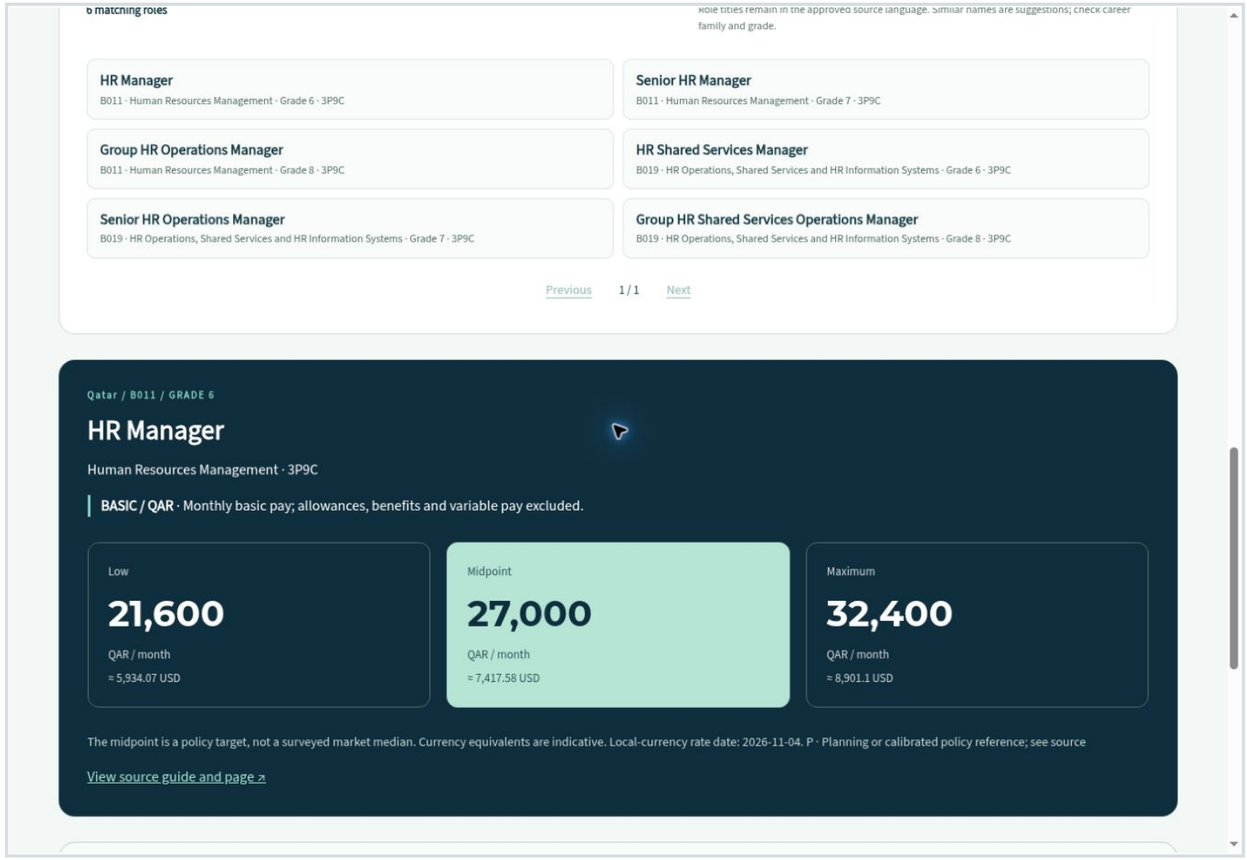
CHECK The underlying reference is unchanged.

02 Choose the main display currency

Use 'Big-number currency' when you want the principal salary values shown in another supported currency. Keep the source-currency context in your notes.

CHECK The visual display uses the chosen currency.

CURRENT LIVE SCREEN



Local-currency salary figures with indicative USD equivalents.

FIND AND INTERPRET SALARY REFERENCES / STEPS 3–4 OF 5

OPEN SOURCE

Use currency conversion correctly

03 Use the Currency Desk for a separate amount

Enter 'Amount', choose 'From' and 'To'. The reviewed example converts 27,000 QAR to approximately 7,417.58 USD.

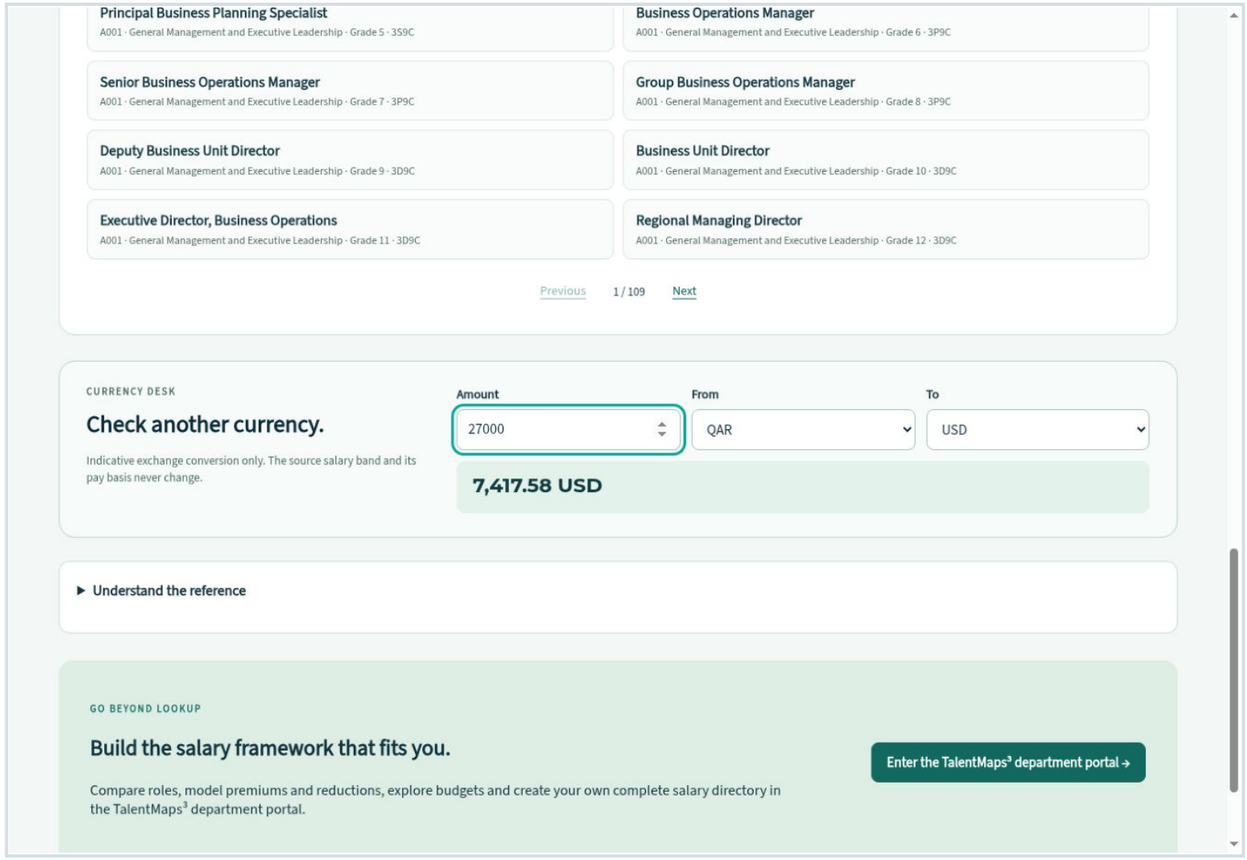
CHECK The separate conversion result reflects the selected amount and currencies.

04 Check the rate date

Read the latest-available rate note. The page says dates can vary by currency and describes the conversion as indicative.

CHECK The comparison includes a dated conversion basis.

CURRENT LIVE SCREEN



Current Currency Desk example: 27,000 QAR converted to USD.

FIND AND INTERPRET SALARY REFERENCES / STEPS 5–5 OF 5

OPEN SOURCE

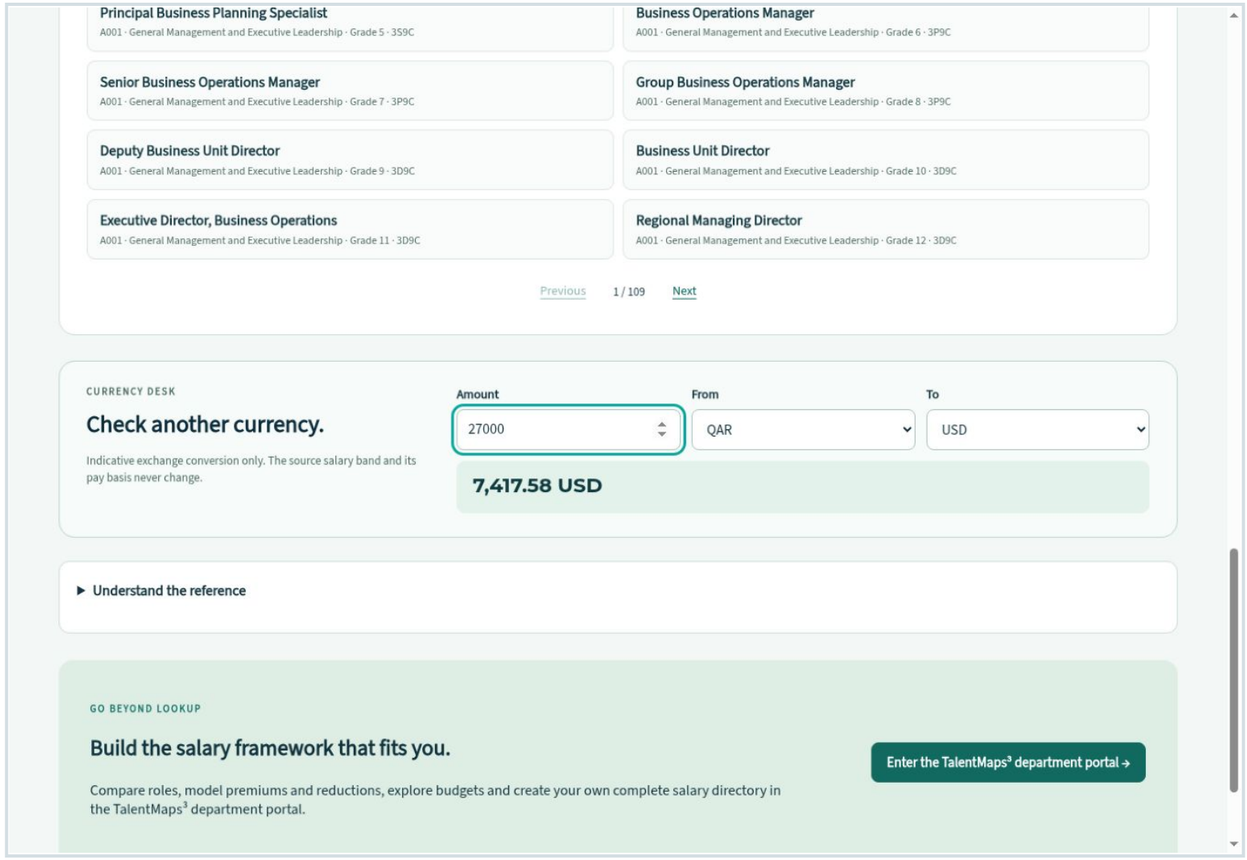
Use currency conversion correctly

05 Carry the qualification into the output

Record local and converted values, currency codes and the date together. Do not imply an exchange-rate conversion supplies a new market benchmark.

CHECK Readers can understand and reproduce the comparison.

CURRENT LIVE SCREEN



Current Currency Desk example: 27,000 QAR converted to USD.

FIND AND INTERPRET SALARY REFERENCES / F-01-03

OPEN SOURCE

Handle source limitations and unpriced markets

Use salary references proportionately when data is limited.

WHO USES THIS Reward analyst

BEFORE YOU BEGIN

- Selected market and role
- Reference purpose
- Local reward policy

WHAT YOU WILL HAVE

- Qualified salary-reference note

CHECK BEFORE YOU FINISH

- Unpriced does not mean zero
- Included/excluded components are clear
- Planning bands are not described as surveyed percentiles

A client asks for a market percentile	Explain the actual reference basis and identify the additional market evidence needed rather than relabelling a policy band.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Reference interpretation follows the live tool’s own wording.

FIND AND INTERPRET SALARY REFERENCES / STEPS 1–2 OF 5

OPEN SOURCE

Handle source limitations and unpriced markets

01 Read the source classification

Review the source note, pay basis and any planning/calibration marker for the selected band. Do not treat all markets as having identical evidence.

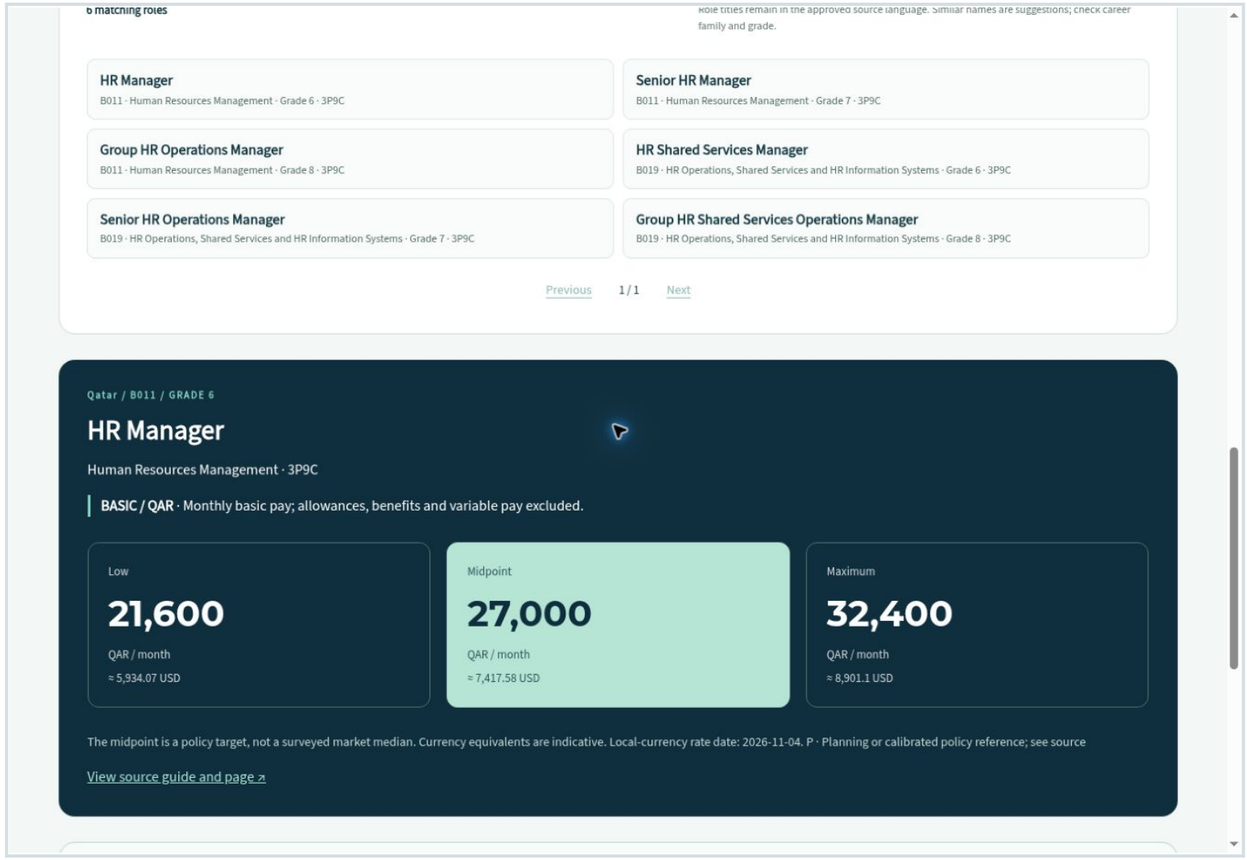
CHECK The source strength and meaning are understood.

02 Keep unavailable values unavailable

The public explorer includes explicitly unpriced countries. Do not replace missing values with zero or a neighbouring country without a documented separate assumption.

CHECK Missing data remains visible to the decision-maker.

CURRENT LIVE SCREEN



The selected result explicitly identifies basic pay, source classification and midpoint interpretation.

FIND AND INTERPRET SALARY REFERENCES / STEPS 3–4 OF 5

OPEN SOURCE

Handle source limitations and unpriced markets

03 Use comparable pay definitions

Align monthly/annual, basic/total pay and currency when comparing sources. Note allowances, benefits and variable pay separately when excluded.

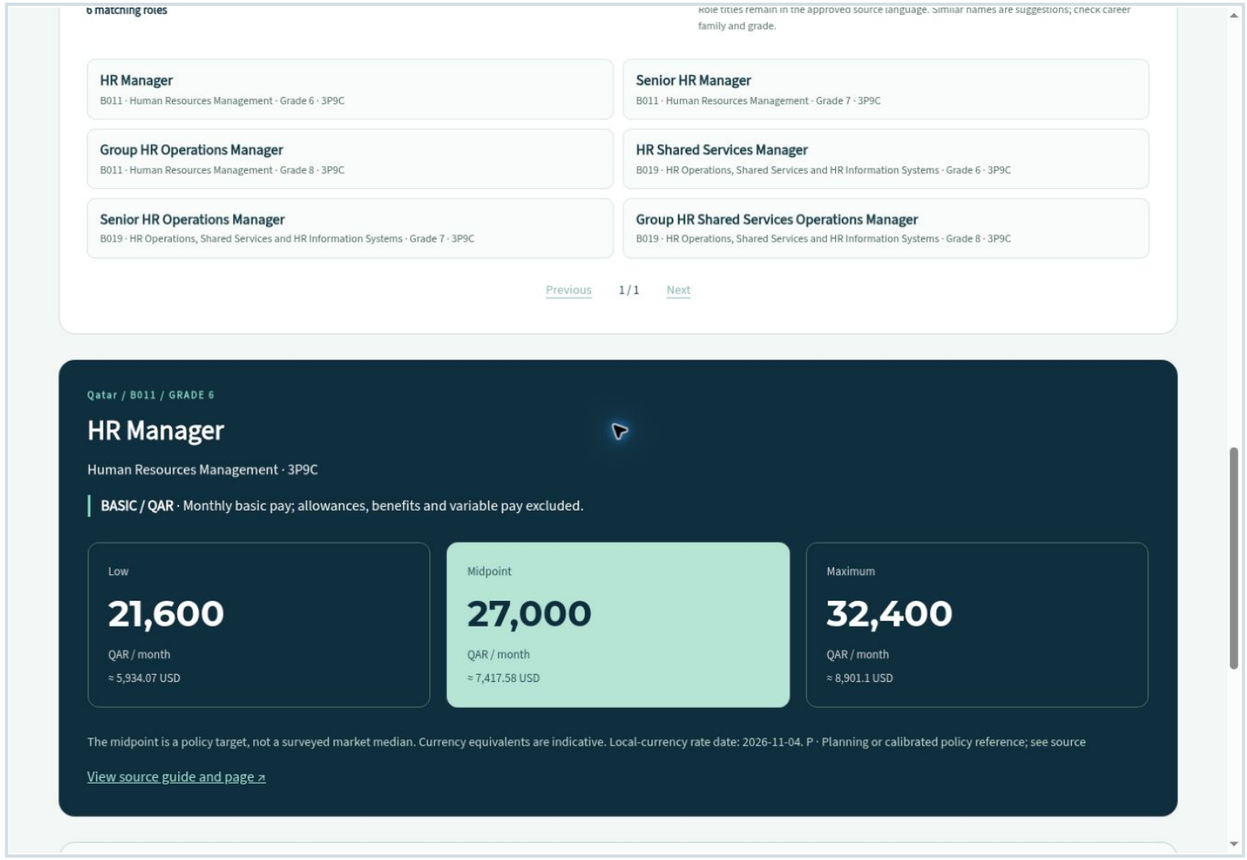
CHECK Differences are not caused by inconsistent definitions.

04 Check the underlying source

Use View source guide and page and the reference explanation before presenting the figures. Consider further evidence where a decision needs stronger market support.

CHECK The decision uses the reference for an appropriate purpose.

CURRENT LIVE SCREEN



The selected result explicitly identifies basic pay, source classification and midpoint interpretation.

FIND AND INTERPRET SALARY REFERENCES / STEPS 5–5 OF 5

OPEN SOURCE

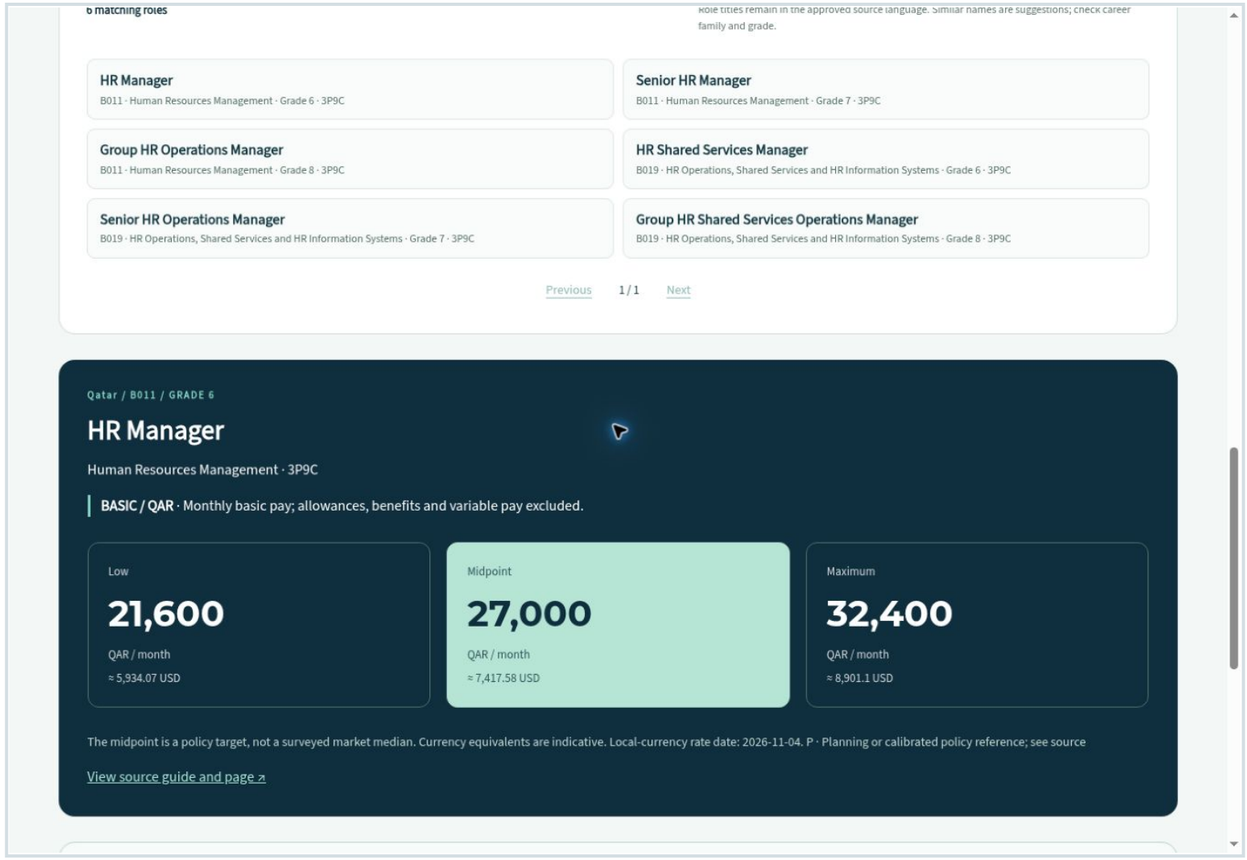
Handle source limitations and unpriced markets

05 Retain the qualification

State the edition, market, role and basis in the comparison or salary guide. Explain any locally adopted adjustment separately.

CHECK Another reader can understand the assumptions.

CURRENT LIVE SCREEN



The selected result explicitly identifies basic pay, source classification and midpoint interpretation.

02

Build pay scenarios and guides

Prepare comparable assumptions before working in the protected salary studio.

---

03 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

BUILD PAY SCENARIOS AND GUIDES / F-02-01

OPEN SOURCE

Model premiums and reductions

Show the effect of an explicit adjustment without hiding the reference band.

WHO USES THIS Reward analyst

BEFORE YOU BEGIN

- Selected source band
- Justified adjustment rule
- Common period and currency

WHAT YOU WILL HAVE

- Baseline and adjusted salary scenario

CHECK BEFORE YOU FINISH

- Baseline is retained
- Adjustment is justified
- Direction and period are correct

A reduction is accidentally entered as a premium	Check the input convention and compare the result to the unchanged band before using the scenario.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Private scenario fields, saving and report generation were not tested.

BUILD PAY SCENARIOS AND GUIDES / STEPS 1–2 OF 5

OPEN SOURCE

Model premiums and reductions

01 Start from the unadjusted reference

Record market, role, grade, period and source basis before making a scenario. Keep the original Low, Midpoint and Maximum available.

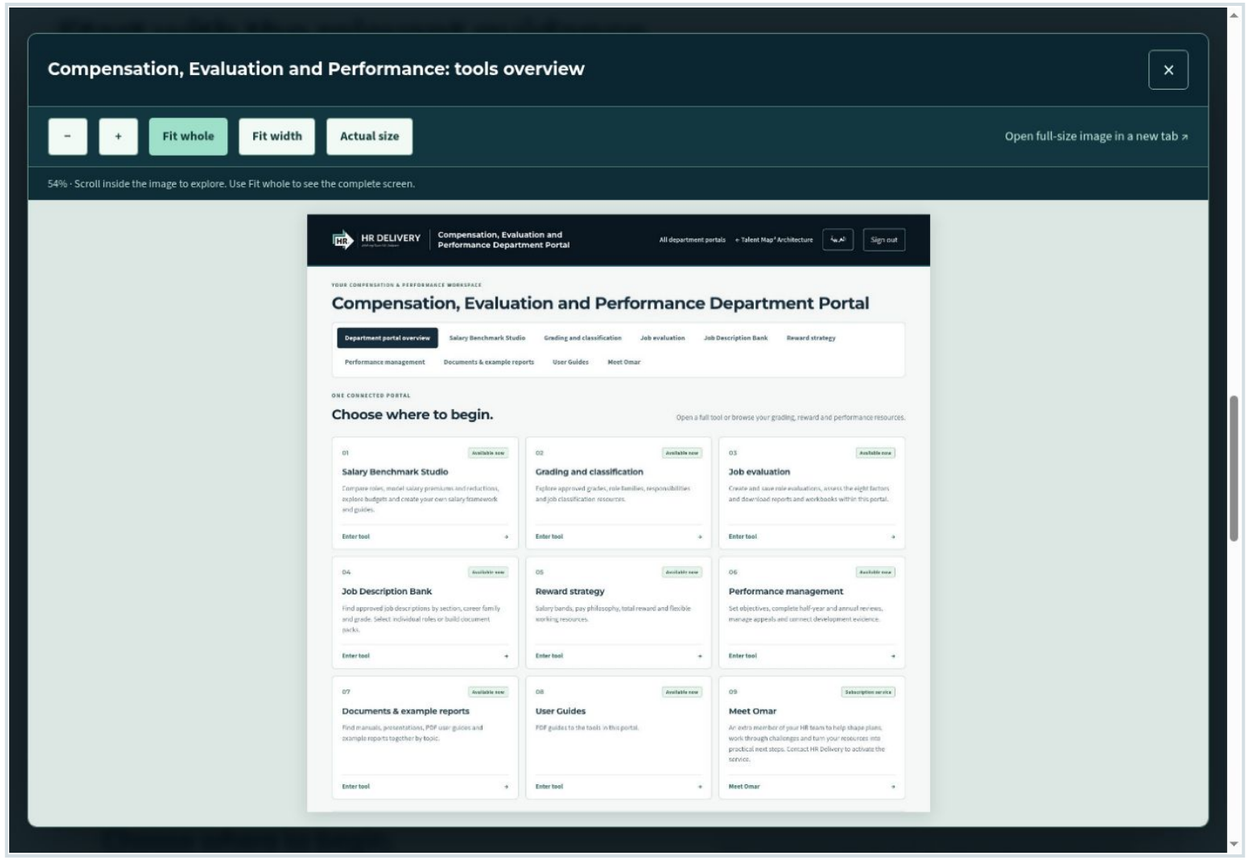
CHECK The adjustment has a clear baseline.

02 Define the scenario purpose

State the reason for a premium or reduction and whether it applies to a specific role, skill or business context. Obtain the appropriate reward-policy decision.

CHECK The scenario is a documented assumption, not an unexplained change.

PUBLISHED DEMONSTRATION



Published Compensation, Evaluation and Performance demonstration; private records and controls were not transaction-tested.

BUILD PAY SCENARIOS AND GUIDES / STEPS 3–4 OF 5

OPEN SOURCE

Model premiums and reductions

03 Use the portal's salary scenario workflow

Enter the agreed adjustment through the private salary modelling tools after confirming the actual controls. The public offer describes premiums and reductions.

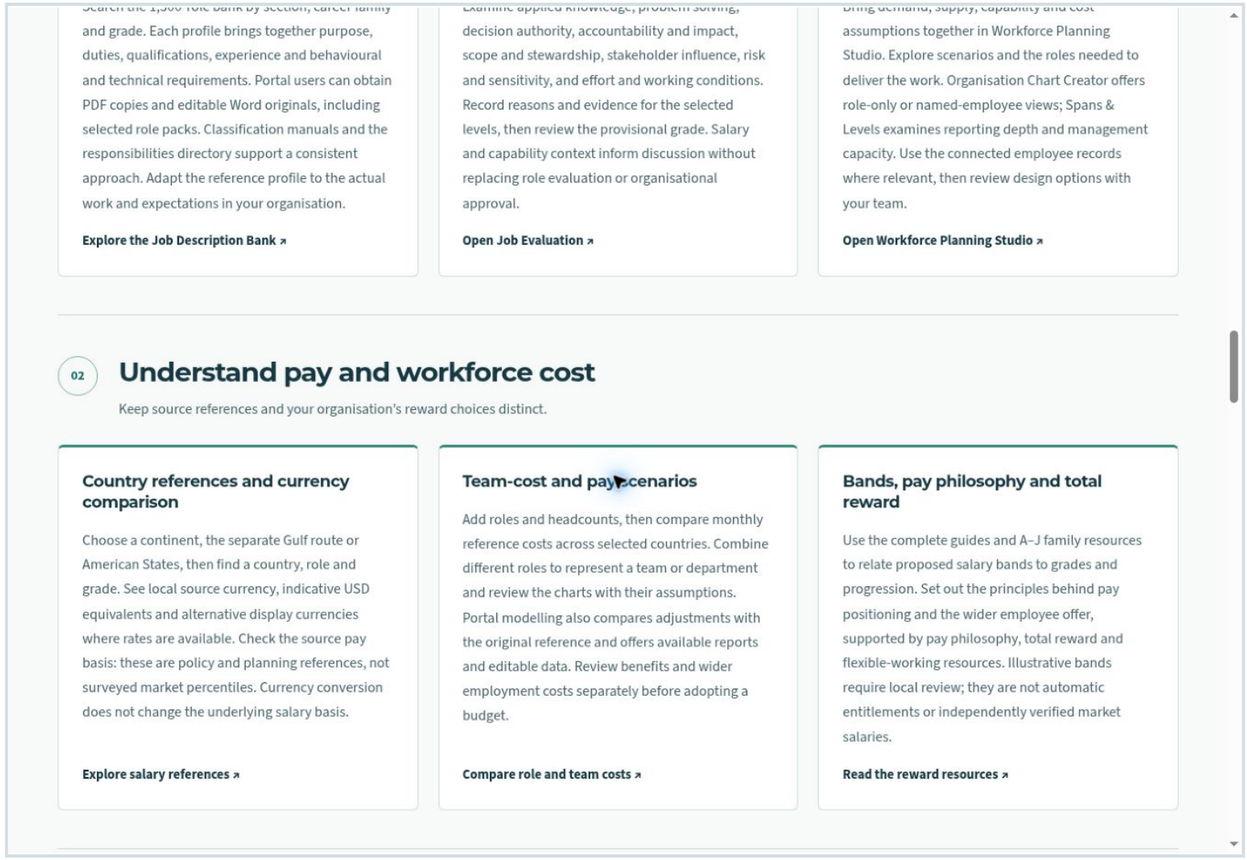
CHECK The scenario can be compared with its baseline.

04 Review the impact

Check arithmetic, direction, currency and period. Compare the original and adjusted band together rather than presenting only the desired figure.

CHECK The audience can see how the assumption changes the range.

PRIOR REVIEWED SCREEN



Published guidance on salary scenarios and team cost assumptions.

BUILD PAY SCENARIOS AND GUIDES / STEPS 5–5 OF 5

OPEN SOURCE

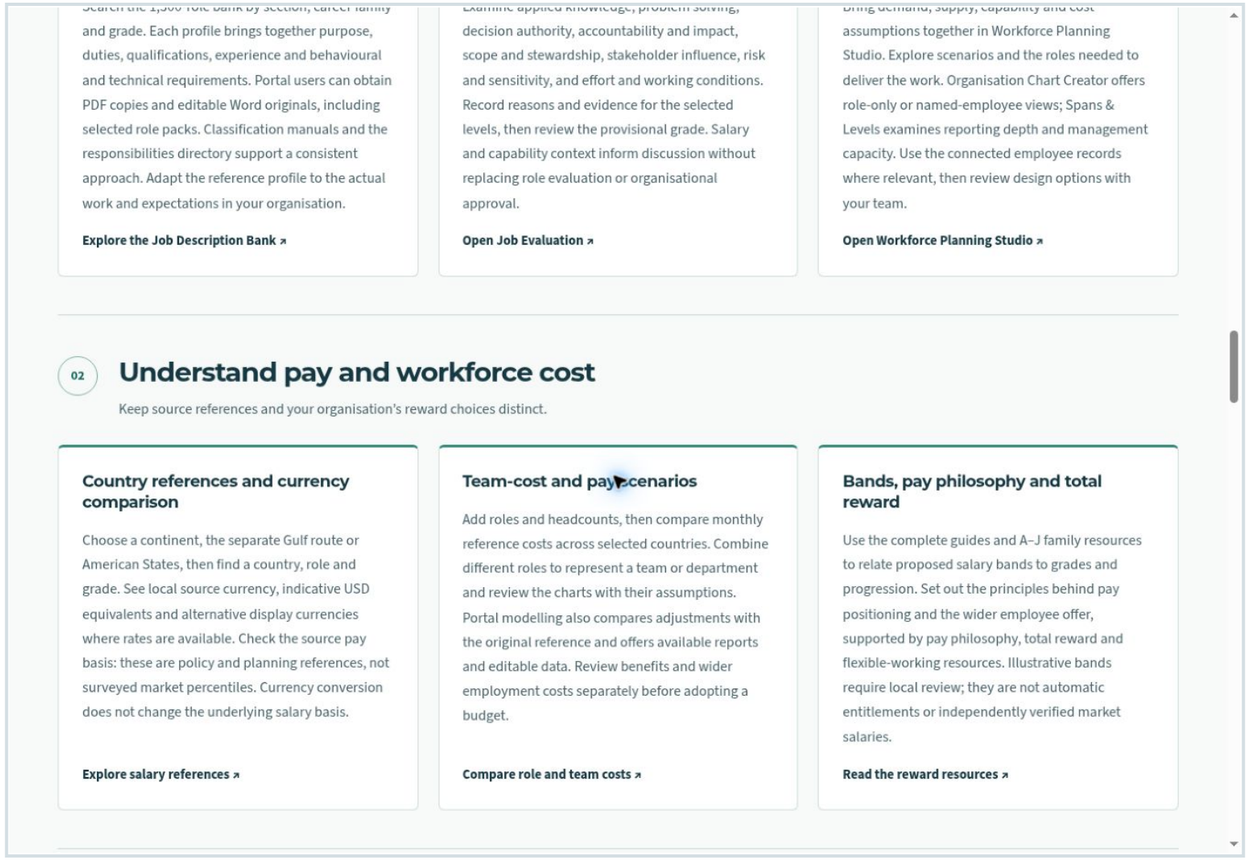
Model premiums and reductions

05 Retain the decision context

Name the scenario, source date, adjustment rationale and reviewer. Use the available report/guide output after checking its behaviour.

CHECK The comparison remains explainable later.

PRIOR REVIEWED SCREEN



Published guidance on salary scenarios and team cost assumptions.

BUILD PAY SCENARIOS AND GUIDES / F-02-02

OPEN SOURCE

Compare the benchmark cost of a team

Create a consistent country/role/headcount comparison.

WHO USES THIS Reward analyst with workforce planner

BEFORE YOU BEGIN

- Role mix and headcounts
- Comparable countries and pay basis
- Common period and currency

WHAT YOU WILL HAVE

- Comparable benchmark salary-cost scenarios
- Role/headcount assumptions

CHECK BEFORE YOU FINISH

- Role mix is consistent
- Missing bands are identified
- Cost scope is explicit

One country appears implausibly cheaper Check pay basis, currency, unpriced roles and the selected salary point before drawing a conclusion.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Publicly described team-cost capability was not transaction-tested; it should not be assumed to include all recruitment/employment costs.

BUILD PAY SCENARIOS AND GUIDES / STEPS 1–2 OF 6

OPEN SOURCE

Compare the benchmark cost of a team

01 Define a consistent team

List each role, grade and number of positions. Keep the same role mix when comparing locations unless a separate design change is explicitly being tested.

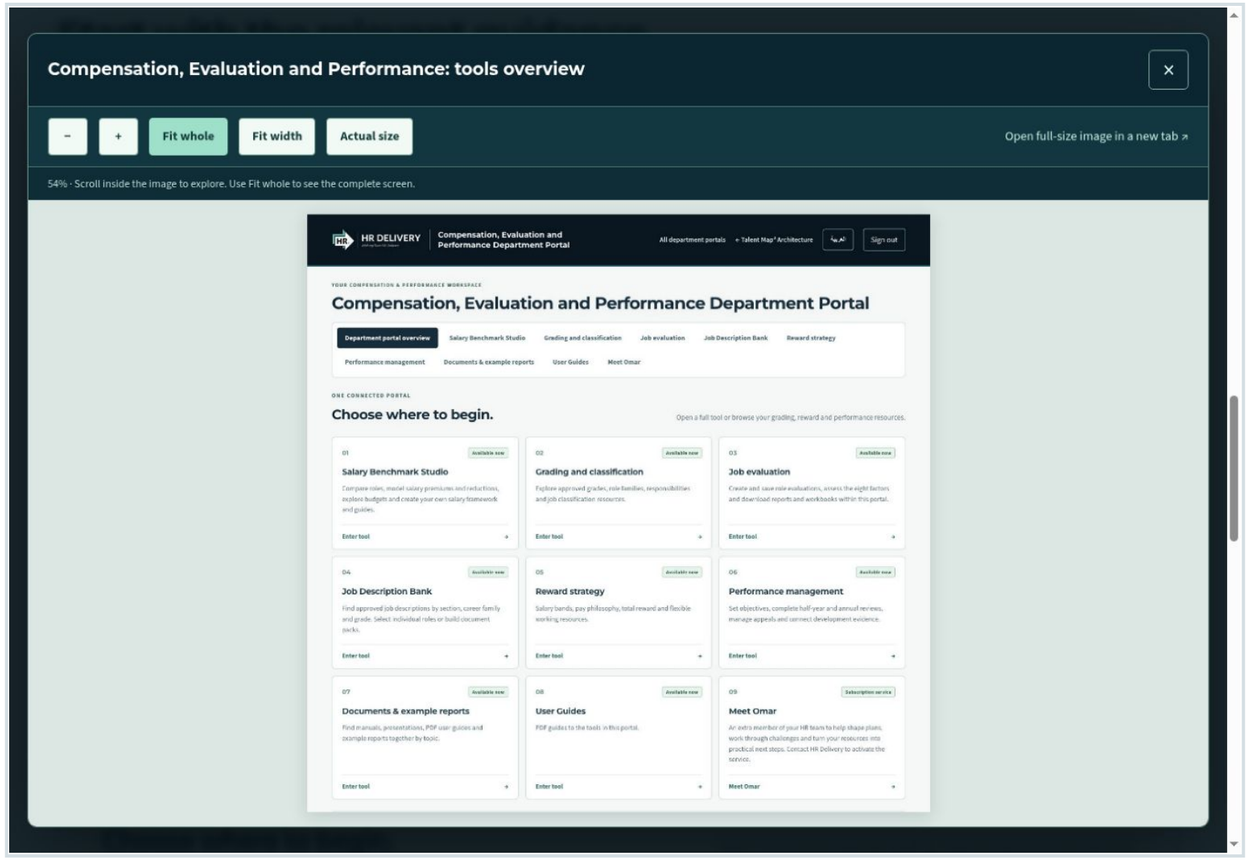
CHECK Country differences can be interpreted on a like-for-like basis.

02 Open the portal team-cost comparison

The public department describes adding roles and headcounts and choosing countries. Confirm the exact private controls and any limits with the administrator.

CHECK The scenario has the intended population.

PUBLISHED DEMONSTRATION



Published Compensation, Evaluation and Performance demonstration; private records and controls were not transaction-tested.

BUILD PAY SCENARIOS AND GUIDES / STEPS 3–4 OF 6

OPEN SOURCE

Compare the benchmark cost of a team

03 Choose the comparison basis

Use a common salary point, period, display currency and pay definition. Keep the source-market basis visible for every location.

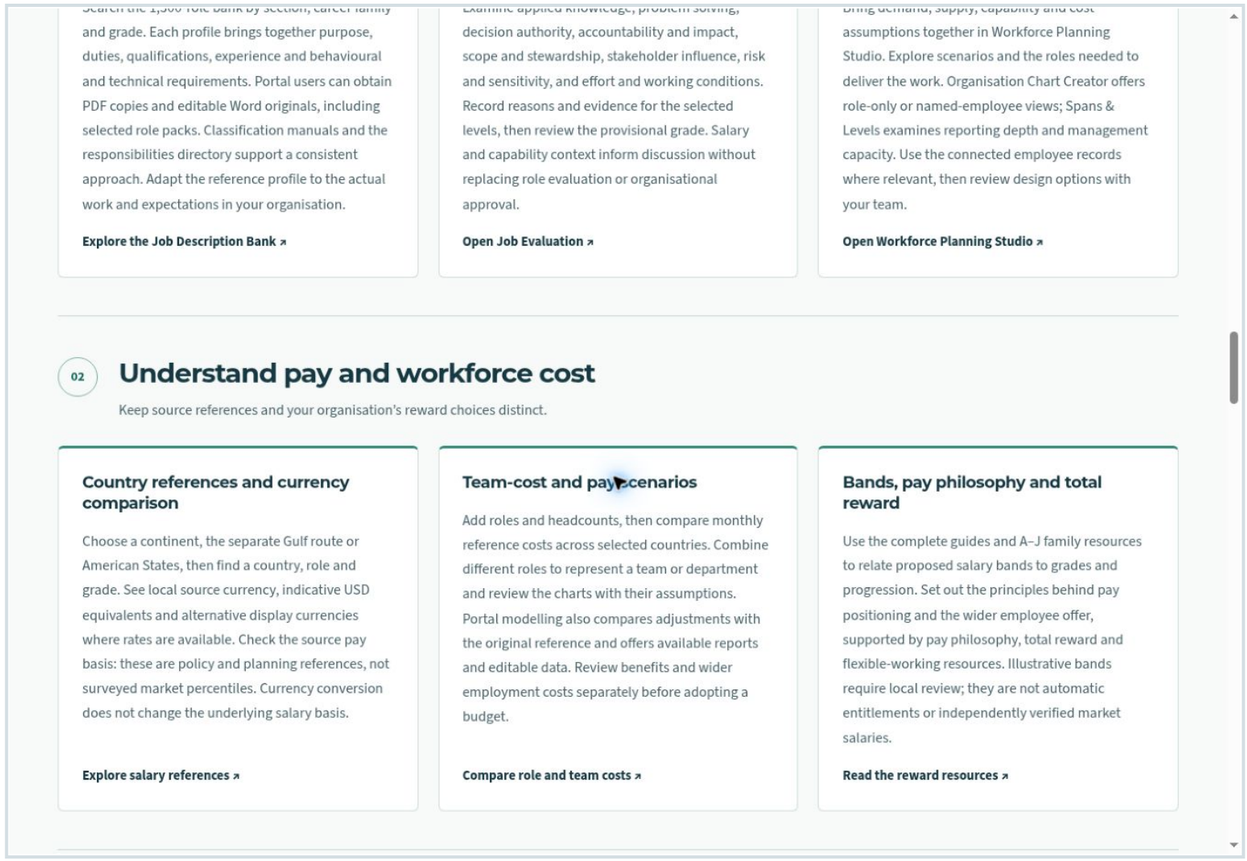
CHECK The comparison is not distorted by inconsistent inputs.

04 Review totals and the chart

Reconcile role quantities and per-role costs to the team total. Investigate unpriced or missing values rather than accepting a lower total without explanation.

CHECK The total can be traced to its component roles.

PRIOR REVIEWED SCREEN



Published team-cost guidance; private modelling controls were not opened.

BUILD PAY SCENARIOS AND GUIDES / STEPS 5–6 OF 6

OPEN SOURCE

Compare the benchmark cost of a team

05 Explain the scope of cost

Treat benchmark salary cost separately from agency fees, visa costs, relocation, employer charges and other employment costs unless explicitly added and documented.

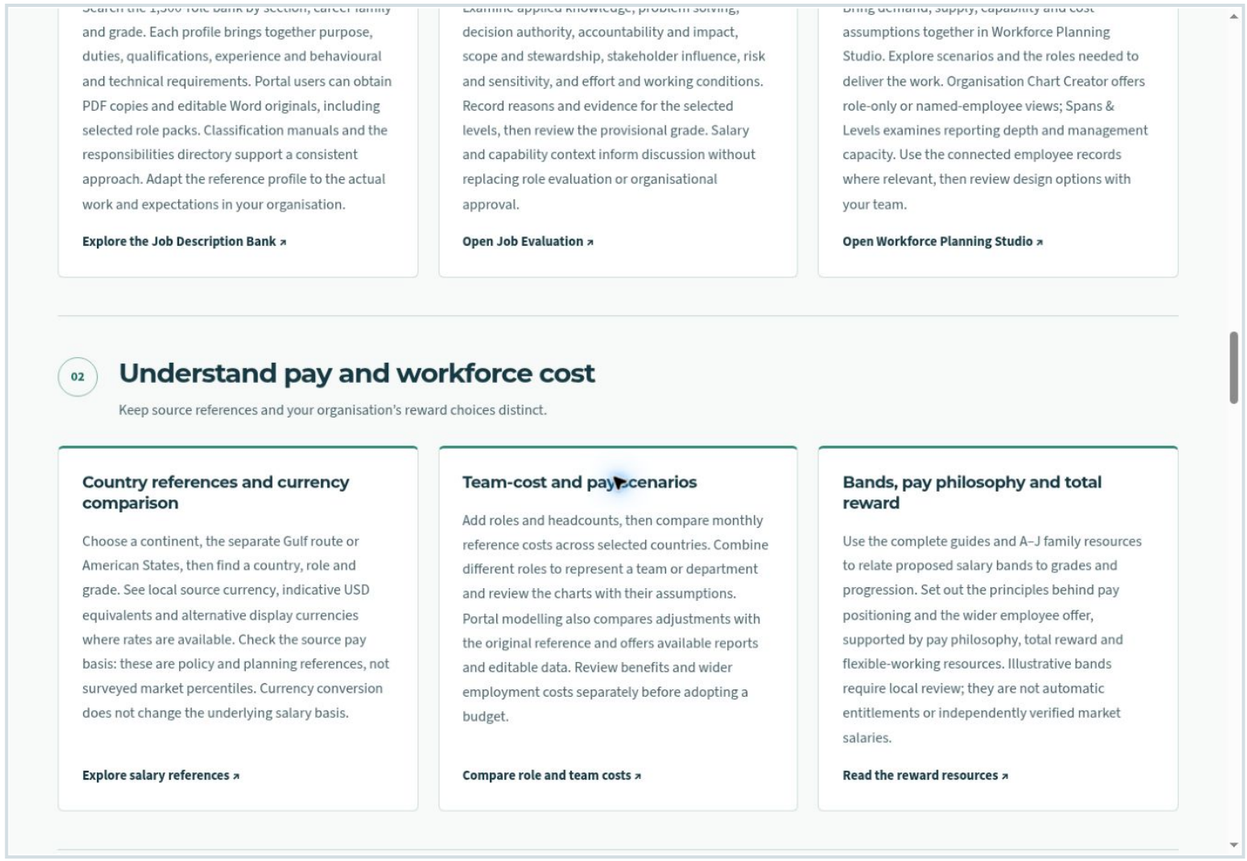
CHECK The output is not mistaken for a fully loaded recruitment budget.

06 Retain assumptions and decisions

Use the scenario/report tools to preserve the role mix, market choices and assumptions for the planning discussion.

CHECK The comparison can be reviewed and updated.

PRIOR REVIEWED SCREEN



Published team-cost guidance; private modelling controls were not opened.

BUILD PAY SCENARIOS AND GUIDES / F-02-03

OPEN SOURCE

Prepare a salary framework or guide

Build a reviewable directory from consistent role and pay references.

WHO USES THIS Reward policy owner

BEFORE YOU BEGIN

- Adopted job architecture
- Reward philosophy and approval route
- Selected markets and pay basis

WHAT YOU WILL HAVE

- Draft salary framework
- Reviewed salary guide/directory

CHECK BEFORE YOU FINISH

- Scope and exclusions are explicit
- Source and policy choices are separated
- Edition and approval are clear

Different sections use incompatible pay bases	Align the definitions or label the difference prominently before the guide is released.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Private guide-building and export workflow was not inspected.

BUILD PAY SCENARIOS AND GUIDES / STEPS 1–2 OF 5

OPEN SOURCE

Prepare a salary framework or guide

01 Confirm the framework scope

Decide which career families, grades, countries and employee groups the guide covers. Identify exclusions and any local variations.

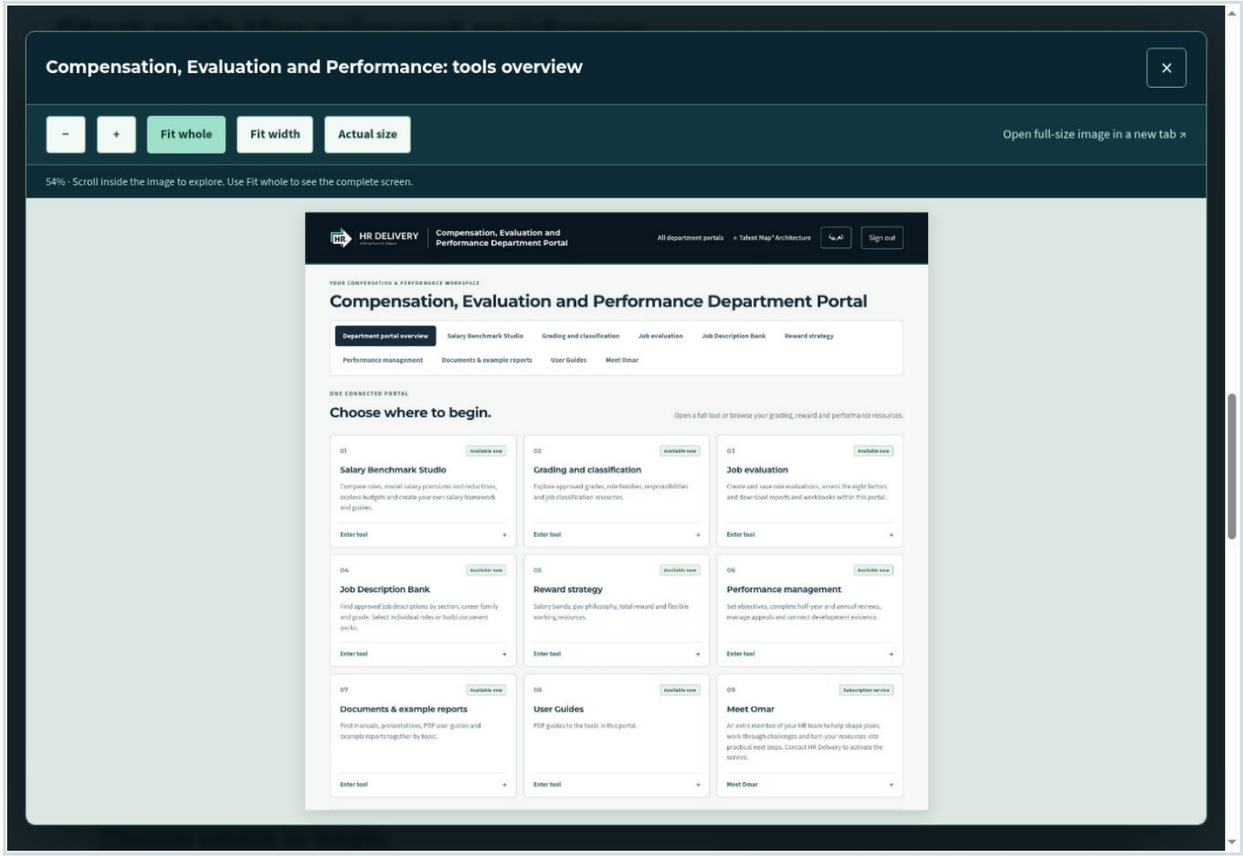
CHECK The reader can understand the guide's intended use.

02 Set the policy approach

Agree the pay philosophy, relationship between grades and ranges, and treatment of allowances, benefits and variable pay. Do not infer policy from a single benchmark.

CHECK The framework has an explicit organisational basis.

PUBLISHED DEMONSTRATION



Published Compensation, Evaluation and Performance demonstration; private records and controls were not transaction-tested.

BUILD PAY SCENARIOS AND GUIDES / STEPS 3–4 OF 5

OPEN SOURCE

Prepare a salary framework or guide

03 Build from checked references

Use the portal's described salary-guide builder with the selected roles and market assumptions. Confirm the actual selection and output controls in the workspace.

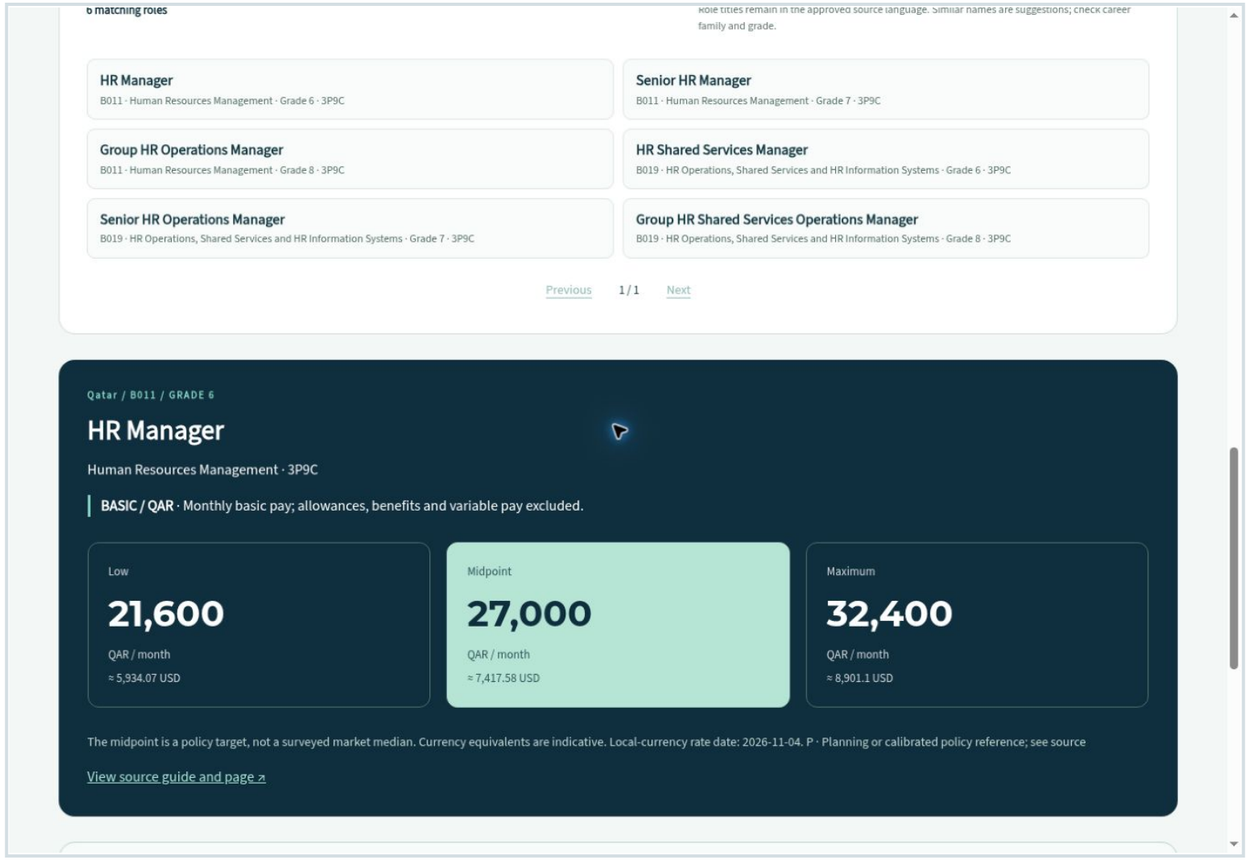
CHECK The directory uses consistent source references.

04 Review the complete guide

Check grade coverage, country, currency, period, source edition and adjustment notes. Reconcile any exceptions with the policy owner.

CHECK The guide is internally consistent and explainable.

CURRENT LIVE SCREEN



Example of the source details a salary guide should preserve.

BUILD PAY SCENARIOS AND GUIDES / STEPS 5–5 OF 5

OPEN SOURCE

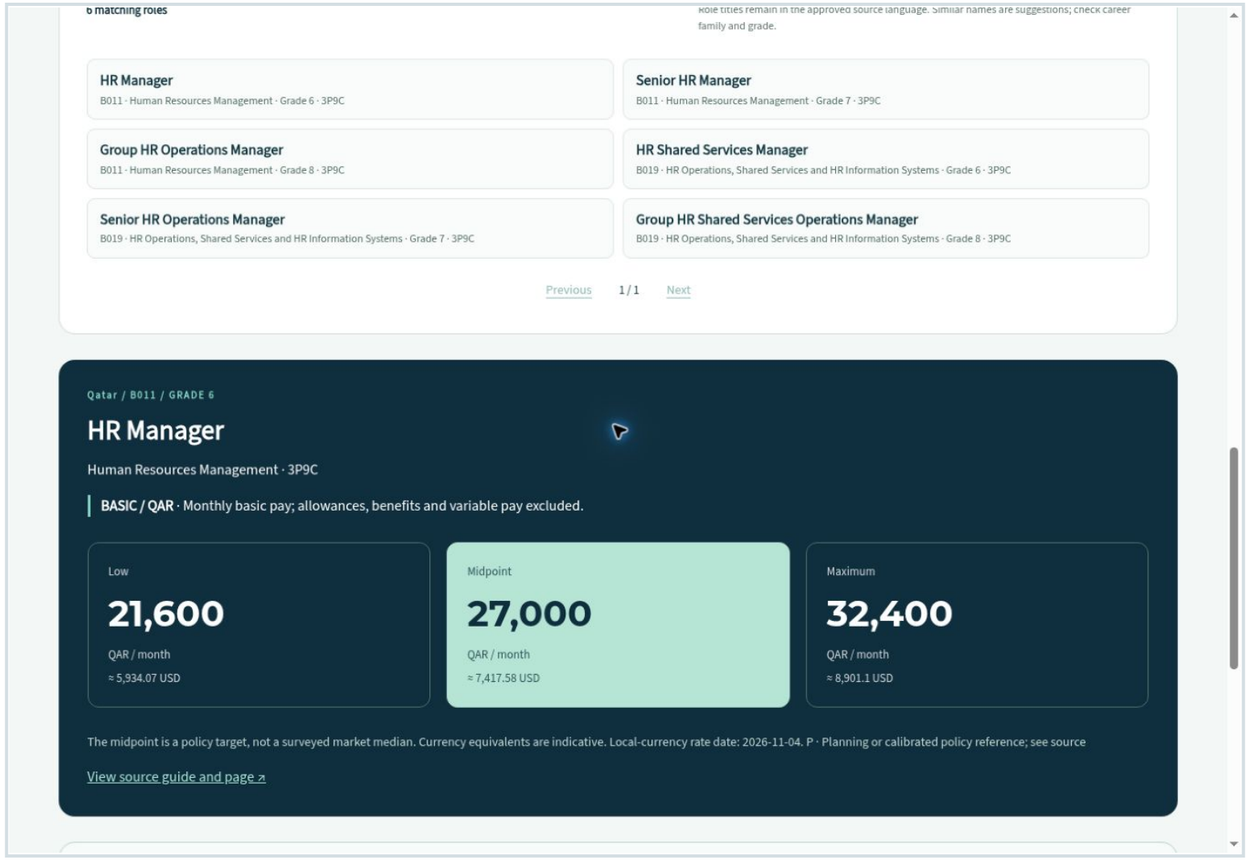
Prepare a salary framework or guide

05 Approve and version the output

Use the organisation’s review process before circulation. Retain the edition, effective date, owner and review cycle with the PDF or editable output.

CHECK Users can identify the current approved salary framework.

CURRENT LIVE SCREEN



Example of the source details a salary guide should preserve.

03 Describe the role for evaluation

Complete the facts before selecting factor degrees.

04 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

DESCRIBE THE ROLE FOR EVALUATION / F-03-01

OPEN SOURCE

Start Evalu8 and complete role identity

Create an accurate foundation for the evaluation.

WHO USES THIS Role owner or HR partner

BEFORE YOU BEGIN

- Current authorised role brief
- Stable role reference
- Country and career family

WHAT YOU WILL HAVE

- Role identity and purpose
- Knowledge/experience requirements

CHECK BEFORE YOU FINISH

- Current authorised scope is used
- Reference is stable
- Incumbent characteristics do not determine job size

A button initially appears unresponsive	Allow the page to finish loading, then recheck the visible state. The worked example opened after initialisation in this review.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Read-only supplied example inspected. No new evaluation was saved.

DESCRIBE THE ROLE FOR EVALUATION / STEPS 1–2 OF 6

OPEN SOURCE

Start Evalu8 and complete role identity

01 Choose a starting point

On the public Evalu8 page, use 'Create a role' or 'Start a role evaluation' for an editable local session, or 'Explore the worked example' to learn from the supplied read-only role.

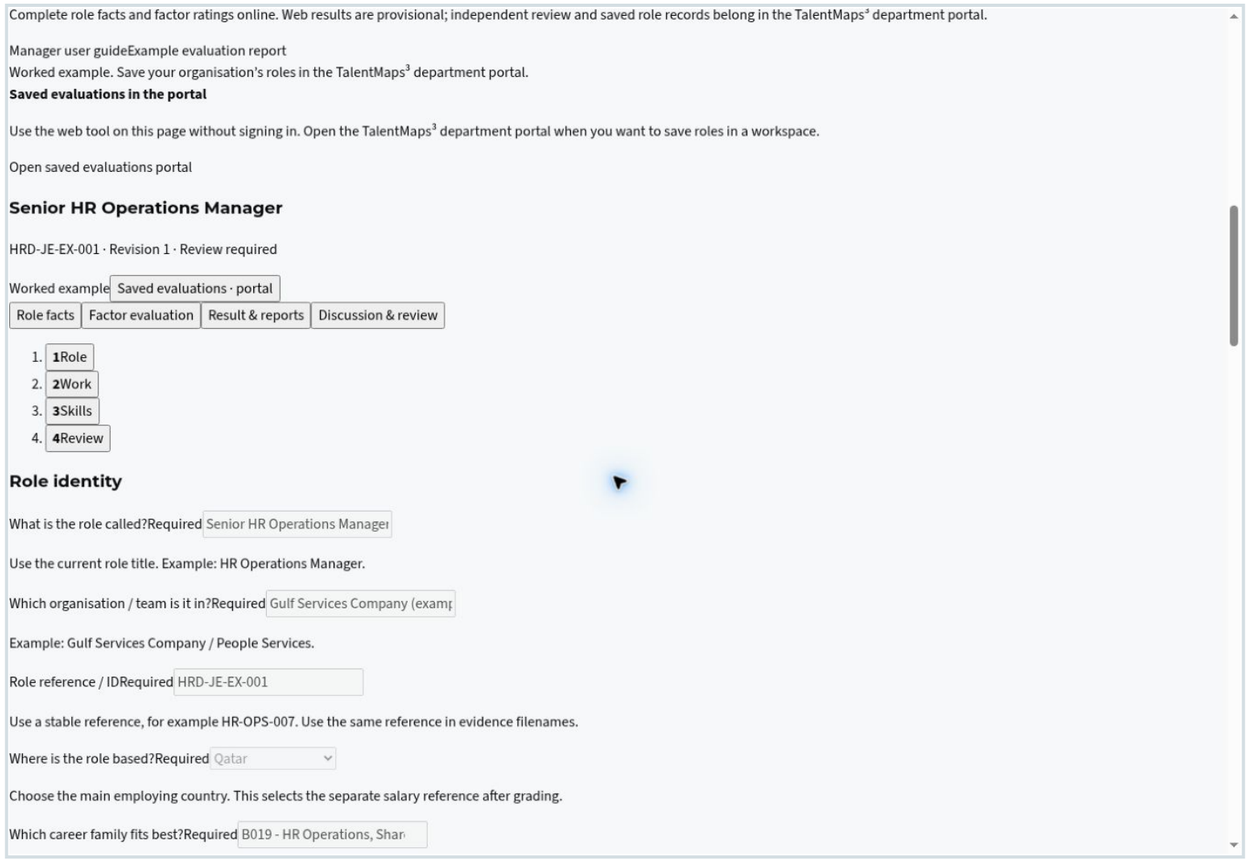
CHECK The four manager steps and evaluation navigation appear.

02 Open 'Role facts' and '1Role'

Complete the role title, organisation/team and role reference. Use a stable reference in the evidence filenames as well.

CHECK The role is identifiable across the evaluation pack.

CURRENT LIVE SCREEN



Current read-only supplied Evalu8 role-identity example.

DESCRIBE THE ROLE FOR EVALUATION / STEPS 3–4 OF 6

OPEN SOURCE

Start Evalu8 and complete role identity

03 Set context and contribution

Complete country, career family, contribution route, reporting role and effective date. Country later selects salary context; it does not set the evaluation grade.

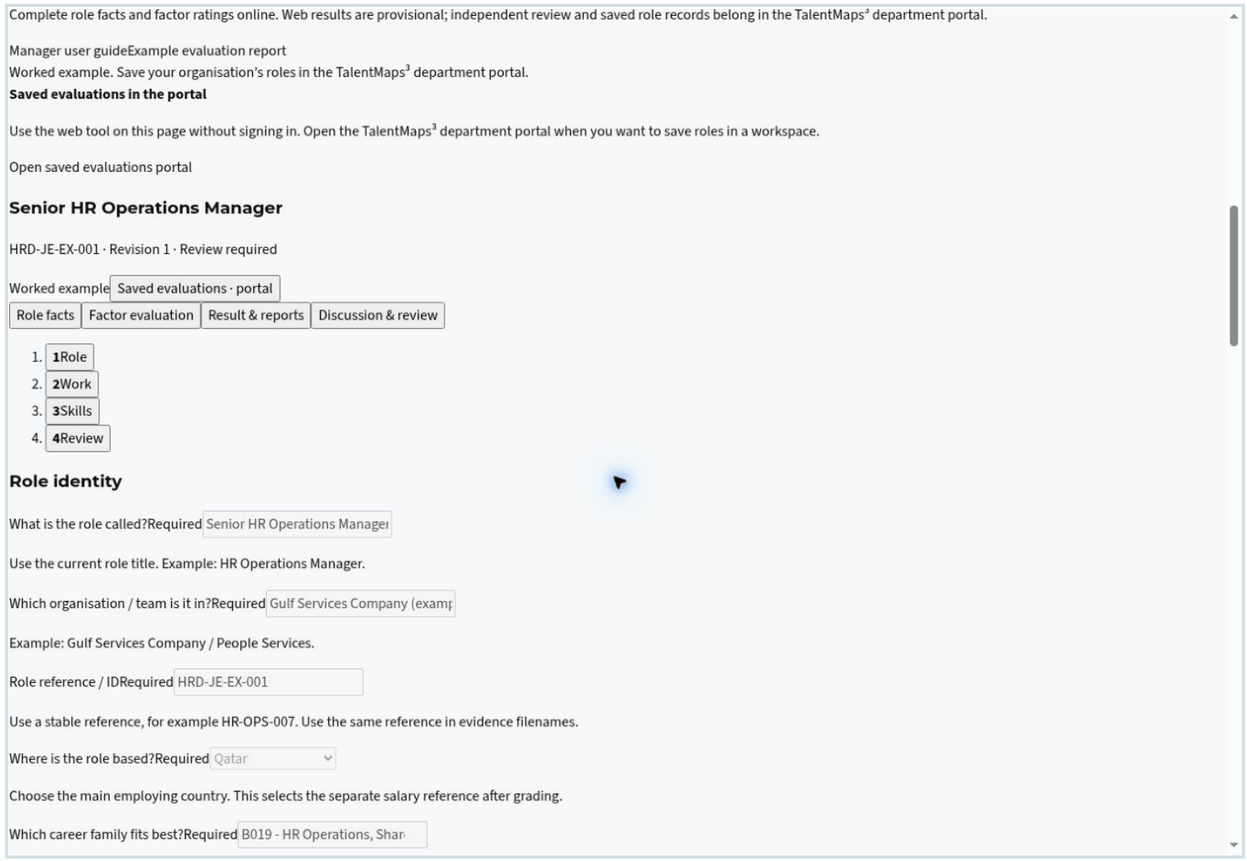
CHECK The work context is explicit.

04 Describe purpose and results

Use Why does this role exist? and What are its three main results? Explain the role's contribution in concise outcome terms.

CHECK The evaluator can understand why the role is needed.

CURRENT LIVE SCREEN



Current read-only supplied Evalu8 role-identity example.

DESCRIBE THE ROLE FOR EVALUATION / STEPS 5–6 OF 6

OPEN SOURCE

Start Evalu8 and complete role identity

05 Set necessary knowledge and experience

Record what the work requires, including qualification/equivalent route, essential licence, experience type and years. Extra qualifications held by the incumbent do not enlarge the role.

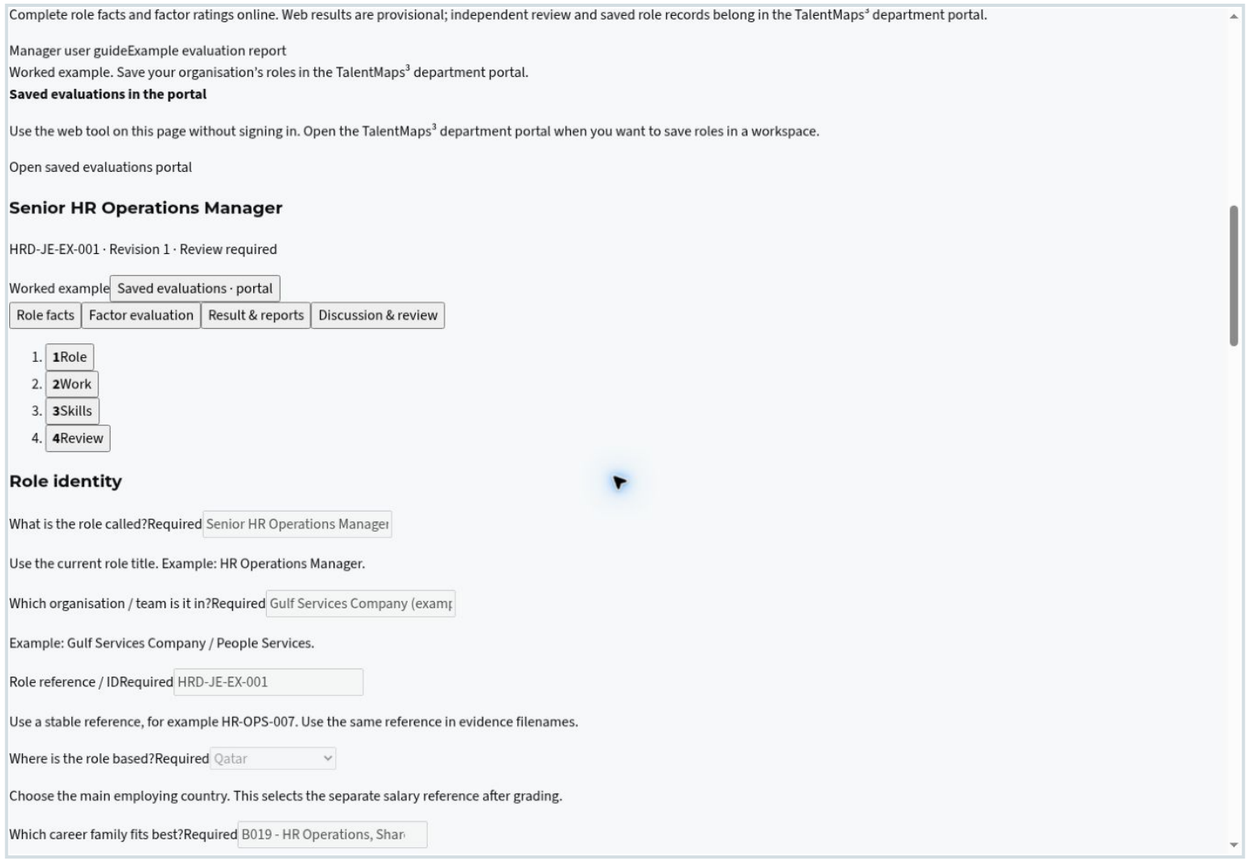
CHECK Requirements are justified by the authorised work.

06 Use 'Continue'

Check the required entries before moving to the work step. The supplied example is read-only and shows completed role facts; it is not an approved live evaluation.

CHECK The work-evidence stage can be completed consistently.

CURRENT LIVE SCREEN



Current read-only supplied Evalu8 role-identity example.

DESCRIBE THE ROLE FOR EVALUATION / F-03-02

OPEN SOURCE

Describe work, authority and normal demands

Provide evidence that distinguishes the scale and complexity of the role.

WHO USES THIS Role owner with HR

BEFORE YOU BEGIN

- Delegation and service evidence
- Organisation chart
- Budget and risk context

WHAT YOU WILL HAVE

- Work and authority evidence
- Financial, stewardship and conditions context

CHECK BEFORE YOU FINISH

- People are not double counted
- Processed money is not called owned budget
- Normal demands are distinguished from exceptional events

The same large number is used under several factors	Clarify what the number represents and avoid allowing one context fact to substitute for distinct factor evidence.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Field sequence inspected in the supplied example; live record entry was not performed.

DESCRIBE THE ROLE FOR EVALUATION / STEPS 1–2 OF 6

OPEN SOURCE

Describe work, authority and normal demands

01 Open '2Work'

Describe a typical difficult problem and the guidance available. Use normal work, not an exceptional incident chosen to inflate the role.

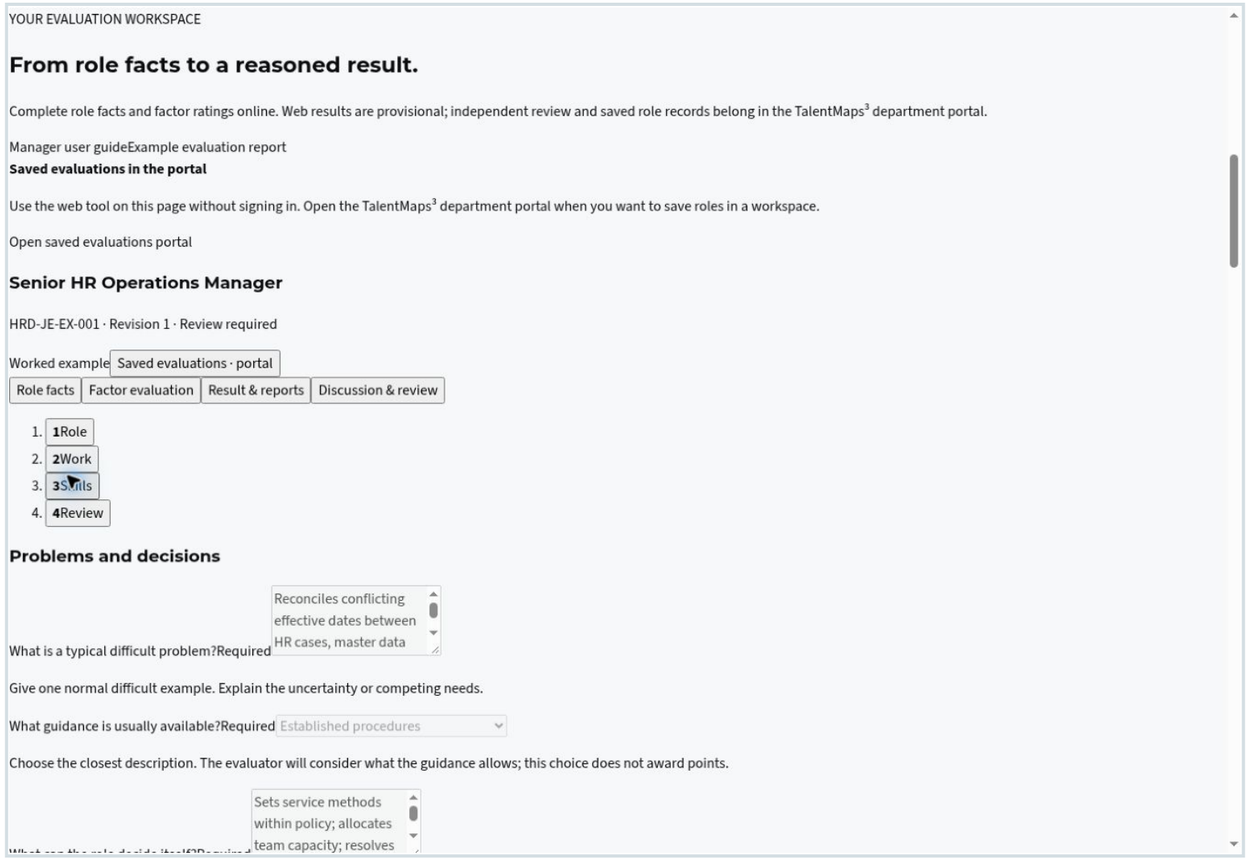
CHECK Problem-solving demands are supported by a concrete example.

02 Record decisions and accountability

Explain what the role can decide, what it must refer and how far ahead it plans. State the results it directly owns and who is affected.

CHECK Decision authority and impact are distinguishable.

CURRENT LIVE SCREEN



Current Evalu8 Work step in the supplied read-only example.

DESCRIBE THE ROLE FOR EVALUATION / STEPS 3–4 OF 6

OPEN SOURCE

Describe work, authority and normal demands

03 Separate managed people from people served

Enter direct reports and further managed people without double counting. Describe technical, matrix or project authority where relevant.

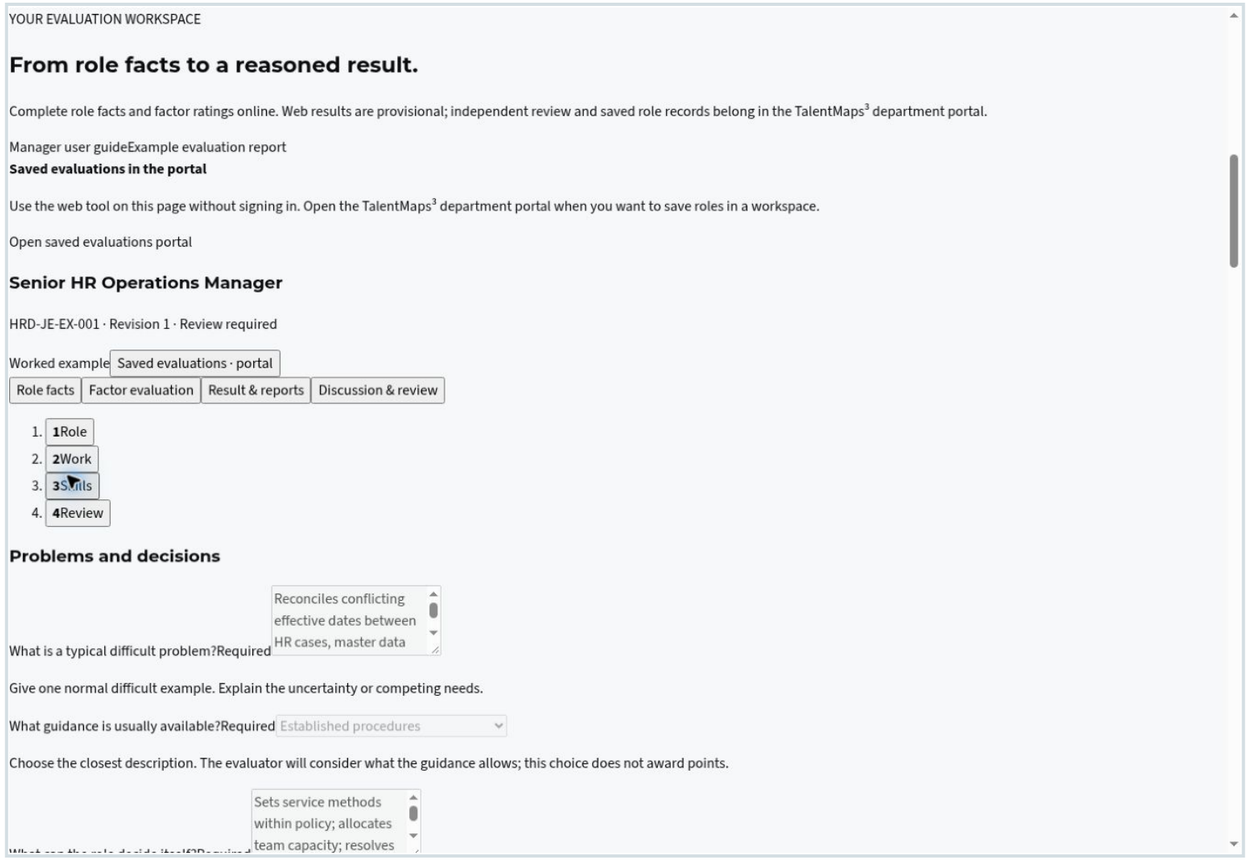
CHECK Stewardship is not confused with the number of customers served.

04 Record actual financial authority

Enter the annual budget controlled, its currency and spending rights. Money processed or influenced belongs in its separate context field.

CHECK Budget ownership is separated from transaction volume.

CURRENT LIVE SCREEN



Current Evalu8 Work step in the supplied read-only example.

DESCRIBE THE ROLE FOR EVALUATION / STEPS 5–6 OF 6

OPEN SOURCE

Describe work, authority and normal demands

05 Describe reach, influence and risk

Explain dependencies, stakeholder agreement, realistic consequences and safeguards. A global employer or internal office politics does not automatically create a larger role.

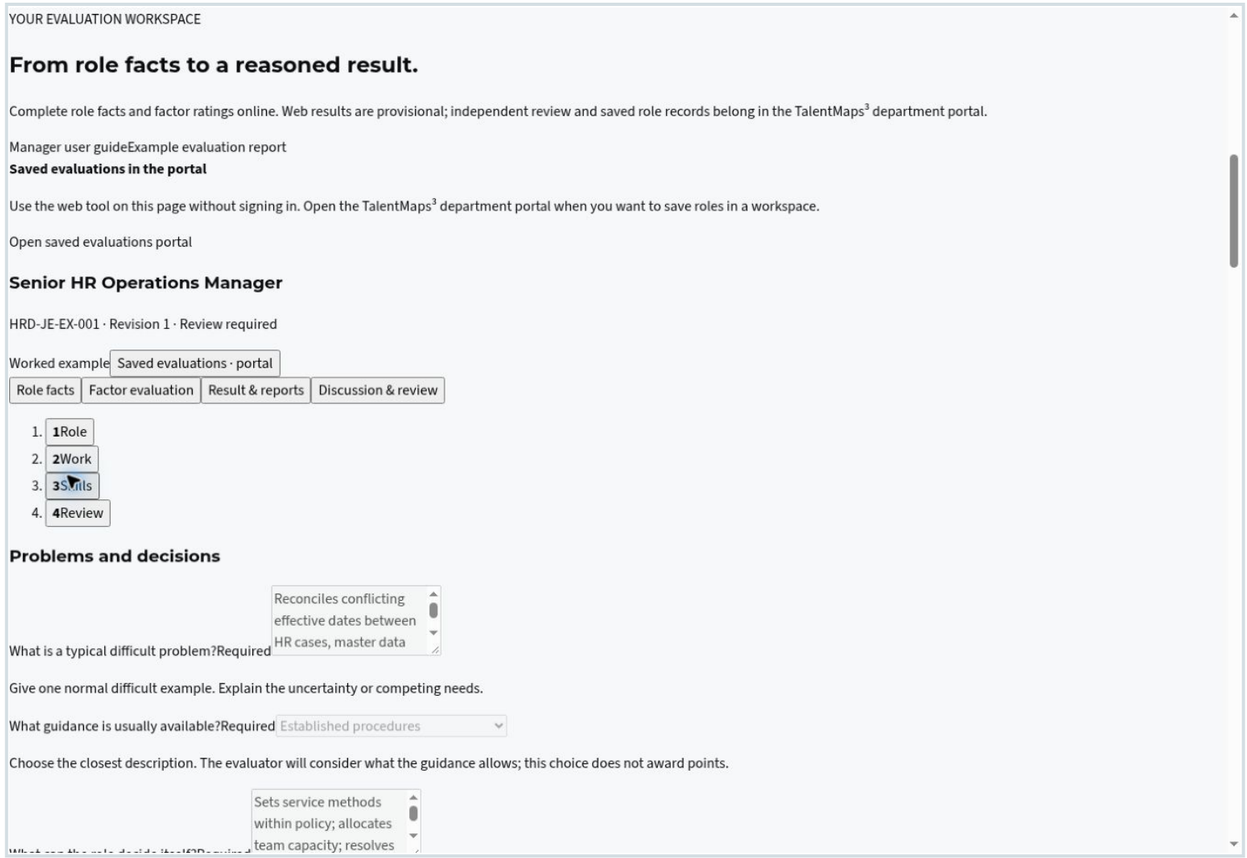
CHECK Scope and influence are grounded in actual responsibility.

06 Describe normal effort and conditions

State the material normal demand, duration/frequency and available breaks, support or controls. Use Continue after checking the required facts.

CHECK Working-condition evidence can be evaluated proportionately.

CURRENT LIVE SCREEN



Current Evalu8 Work step in the supplied read-only example.

DESCRIBE THE ROLE FOR EVALUATION / F-03-03

OPEN SOURCE

Specify technical and behavioural requirements

Choose the capability required by the role rather than rate its current holder.

WHO USES THIS Role owner, technical expert and evaluator

BEFORE YOU BEGIN

- Chosen career family and map
- Approved capability references
- Reason for any non-applicable supporting skill

WHAT YOU WILL HAVE

- Required capability profile

CHECK BEFORE YOU FINISH

- Career family is correct
- Requirements are not employee ratings
- Exceptions have reasons

A country-specific skill appears inappropriate	Review the source context and ask the evaluator or technical expert to document the appropriate requirement or exception.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Read-only level options inspected. Requirements are evidence for evaluation, not automatic extra points.

DESCRIBE THE ROLE FOR EVALUATION / STEPS 1–2 OF 5

OPEN SOURCE

Specify technical and behavioural requirements

01 Open '3Skills'

Review the core and supporting technical skills generated from the selected career family. Read the source description for each required proficiency level.

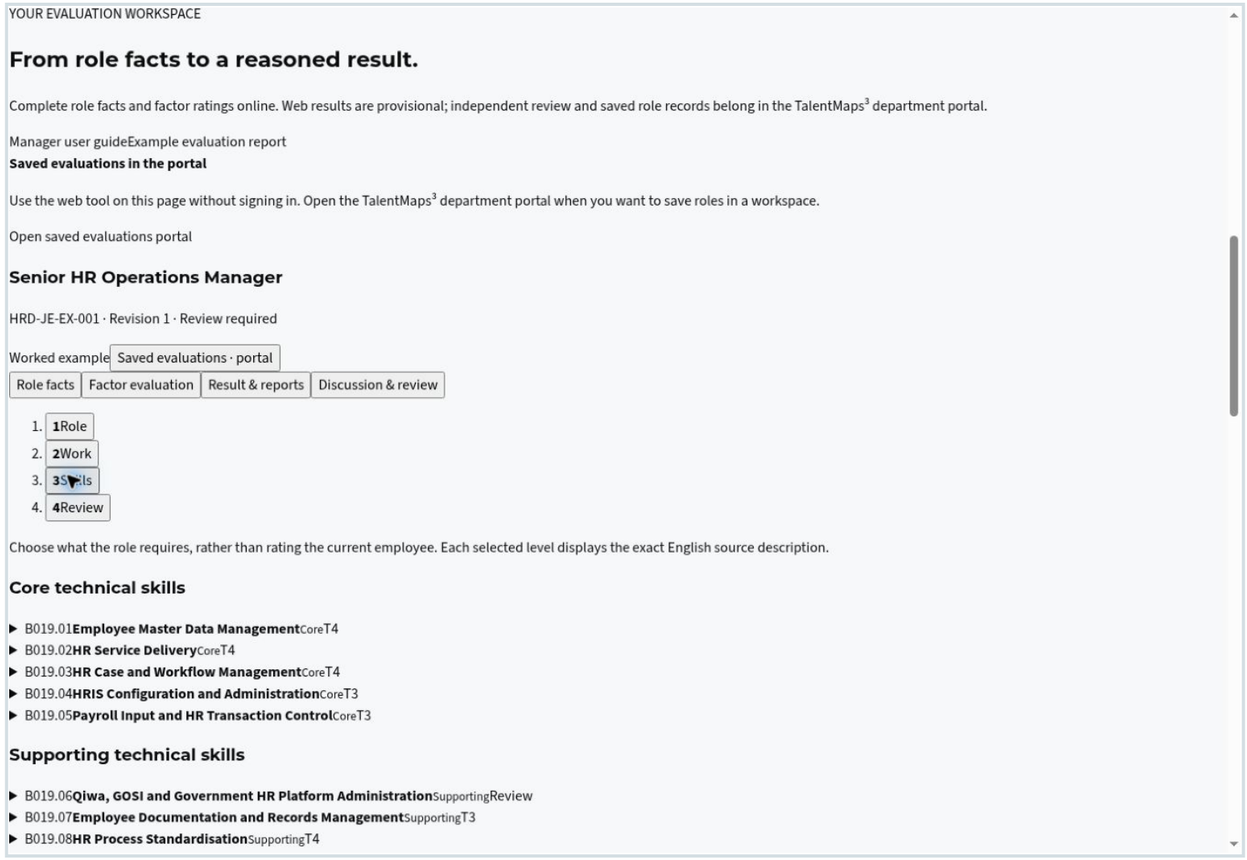
CHECK The capability list matches the intended family.

02 Set core technical expectations

Choose the supported T1–T5 requirement. Where the level is unclear, use the available discussion/review option rather than inventing a degree of proficiency.

CHECK Core requirements are explicit or flagged for review.

CURRENT LIVE SCREEN



Current Evalu8 Skills view: core technical skills and the beginning of supporting requirements in the read-only example.

DESCRIBE THE ROLE FOR EVALUATION / STEPS 3–4 OF 5

OPEN SOURCE

Specify technical and behavioural requirements

03 Review supporting skills

Decide which supporting skills are necessary. The example offers Not required — give a reason for supporting skills; document a meaningful reason where applicable.

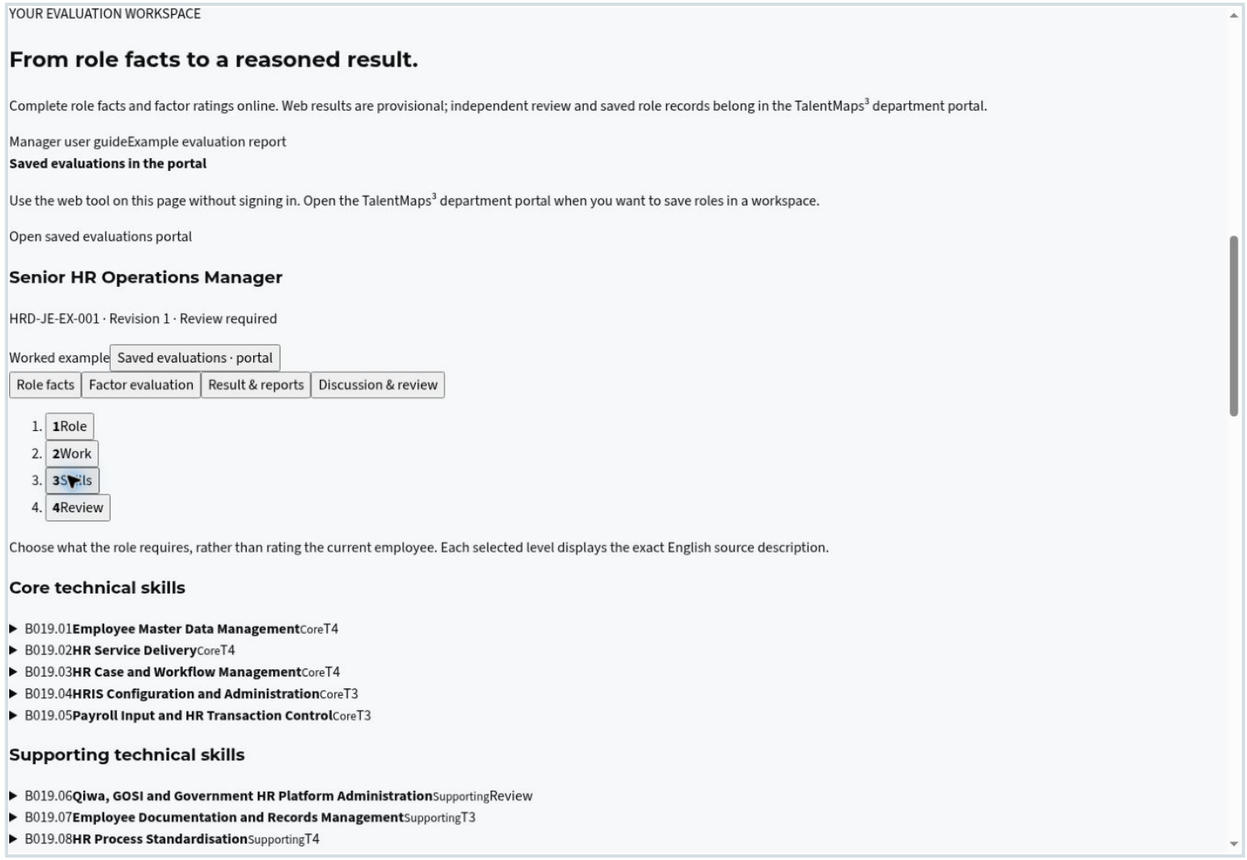
CHECK Exceptions are visible and explainable.

04 Set behavioural requirements

Review the selected map's behavioural requirements and L1–L5 descriptions. Confirm the work's expected level rather than the employee's current strengths.

CHECK The behavioural profile describes the role.

CURRENT LIVE SCREEN



Current Evalu8 Skills view: core technical skills and the beginning of supporting requirements in the read-only example.

DESCRIBE THE ROLE FOR EVALUATION / STEPS 5–5 OF 5

OPEN SOURCE

Specify technical and behavioural requirements

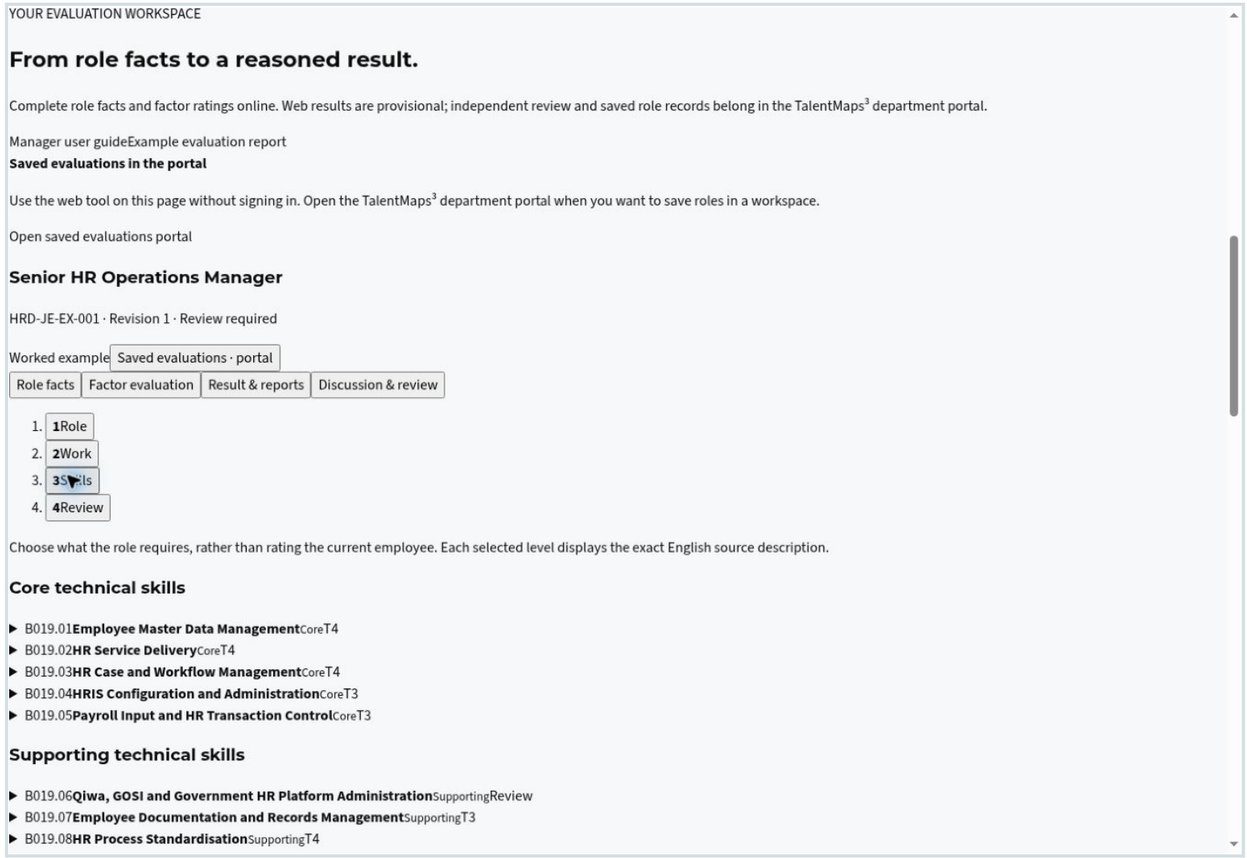
05

Check consistency and continue

Compare the requirements with the role purpose, country and actual authority before moving to factual review.

CHECK Capability expectations are coherent with the work.

CURRENT LIVE SCREEN



Current Evalu8 Skills view: core technical skills and the beginning of supporting requirements in the read-only example.

DESCRIBE THE ROLE FOR EVALUATION / F-03-04

OPEN SOURCE

Complete evidence references and factual confirmation

Make the role description traceable before evaluation.

WHO USES THIS Role owner and confirming manager

BEFORE YOU BEGIN

- Source documents or dated records
- Completed role/work/skills information
- Responsible factual confirmer

WHAT YOU WILL HAVE

- Evidence index
- Factual confirmation

CHECK BEFORE YOU FINISH

- References are identifiable
- Uncertainty is disclosed
- Fact confirmation is separate from grade approval

The form is complete but evidence is weak	Return to the role owner for stronger source material; completeness of fields does not establish the truth of their contents.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The supplied example’s evidence references and confirmation controls were inspected; its evidence remains illustrative.

DESCRIBE THE ROLE FOR EVALUATION / STEPS 1–2 OF 5

OPEN SOURCE

Complete evidence references and factual confirmation

01 Open '4Review'

Use Evidence references to identify the sources supporting the role. Keep employee personal records out of the role evaluation.

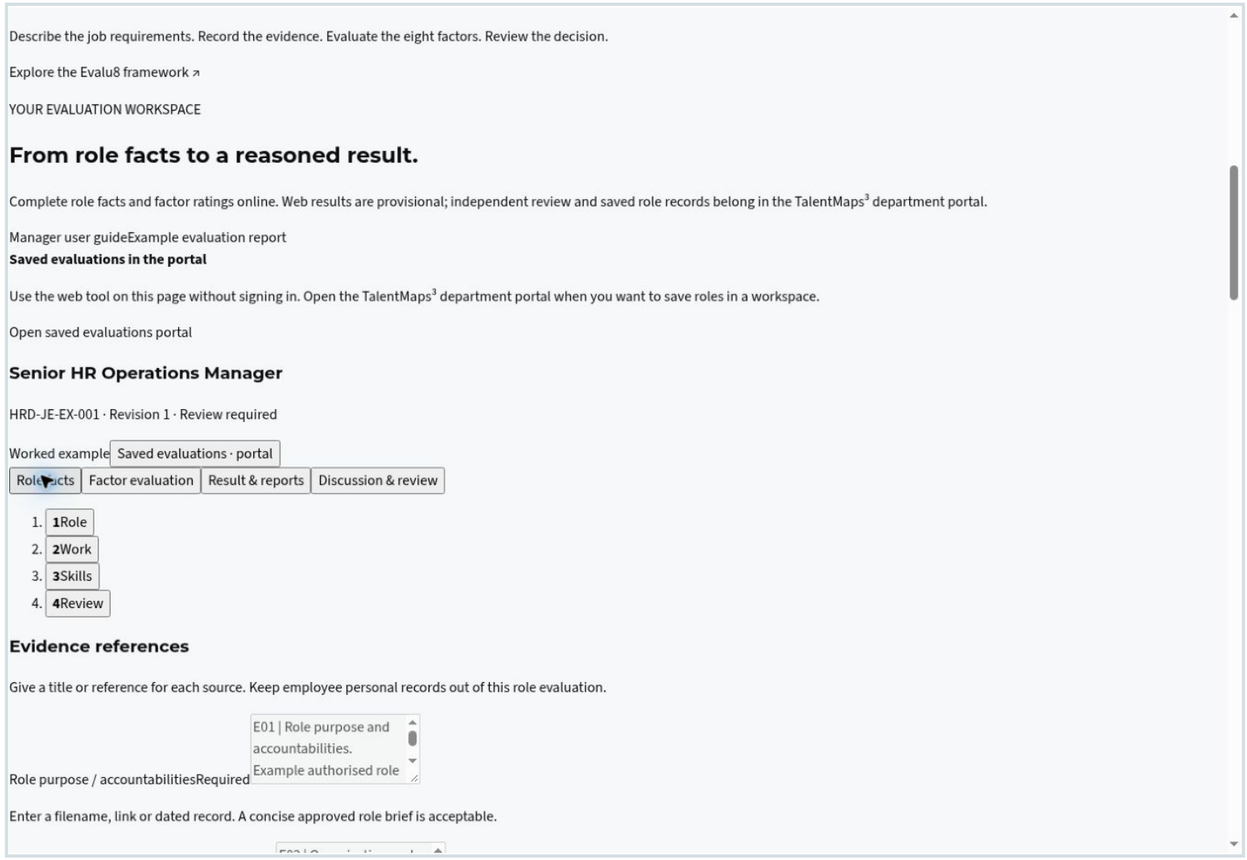
CHECK Each evidence category has a usable reference.

02 Complete the seven evidence areas

Provide role purpose, structure, decision/spending authority, work examples, budget context, risk/control responsibilities and required skills/qualification profile.

CHECK The evaluator can locate the supporting evidence.

CURRENT LIVE SCREEN



Current Evalu8 Review view, beginning with the evidence-reference fields.

DESCRIBE THE ROLE FOR EVALUATION / STEPS 3–4 OF 5

OPEN SOURCE

Complete evidence references and factual confirmation

03 Record uncertainty

Use Anything to discuss with the evaluator? for unclear facts or requirements. Acknowledge gaps rather than presenting them as confirmed evidence.

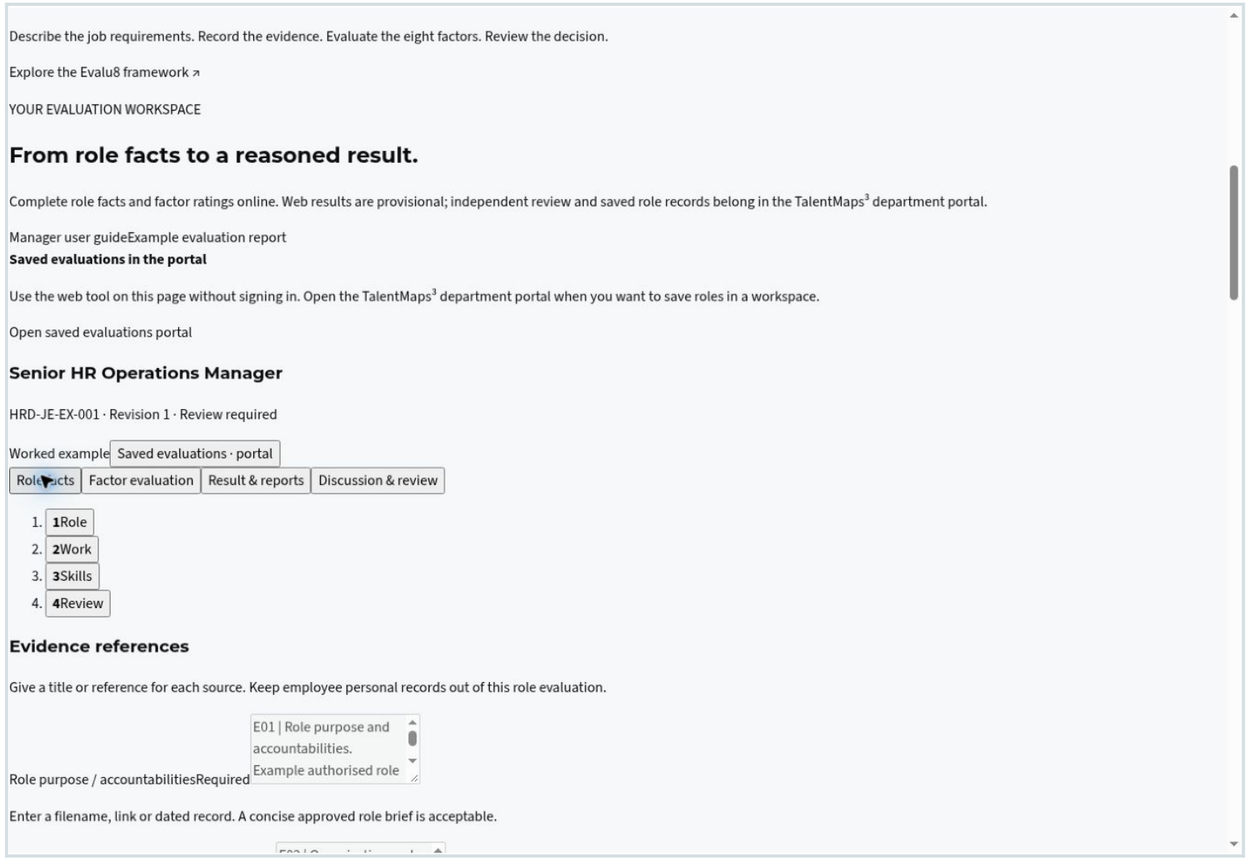
CHECK Outstanding questions are visible.

04 Confirm facts with the role owner

Use Have you checked the role facts?, Role owner / confirming manager and Date the facts were checked. Factual confirmation does not approve a grade.

CHECK The record identifies who confirmed the current facts and when.

CURRENT LIVE SCREEN



Current Evalu8 Review view, beginning with the evidence-reference fields.

DESCRIBE THE ROLE FOR EVALUATION / STEPS 5–5 OF 5

OPEN SOURCE

Complete evidence references and factual confirmation

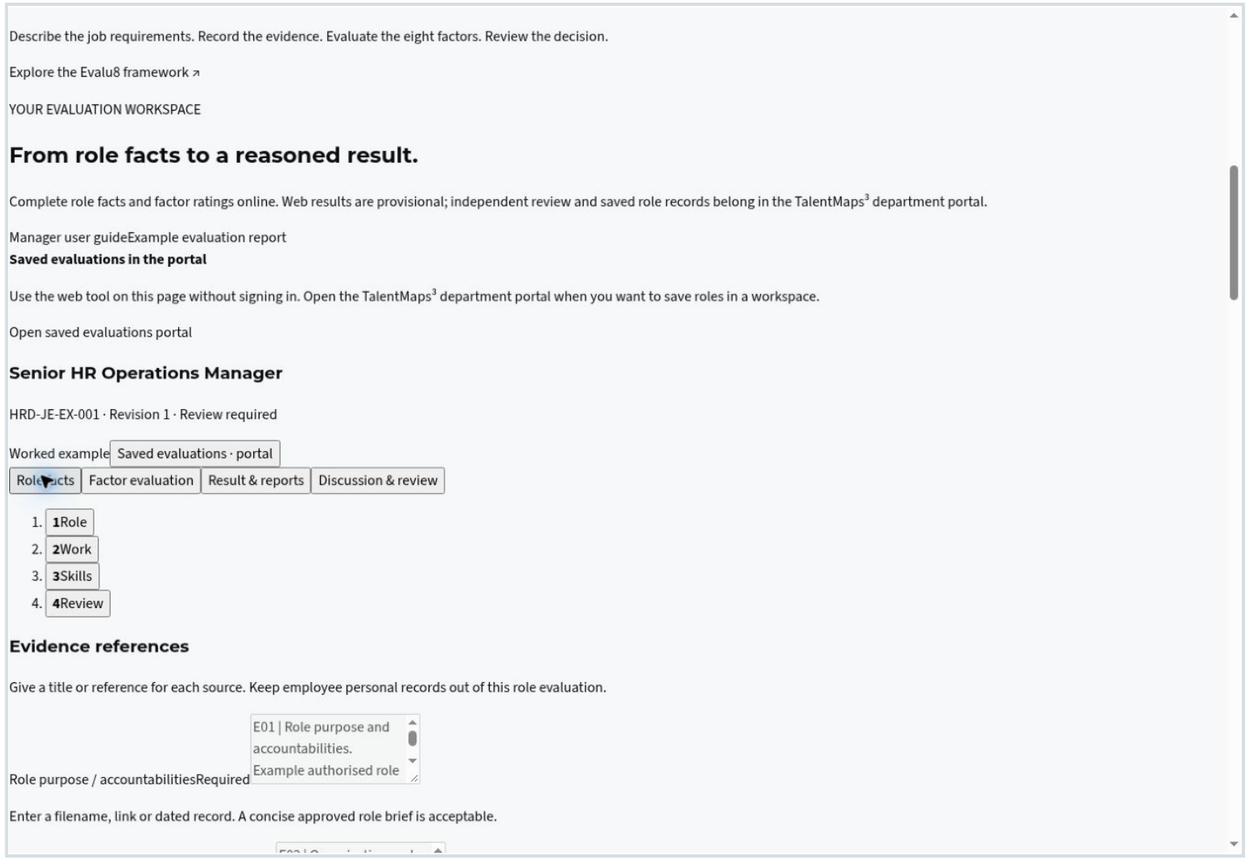
05

Read the role summary

Check Your role at a glance and the completion indicator. Resolve contradictions between purpose, authority, budgets and capability before factor rating.

CHECK The role facts form a coherent basis for evaluation.

CURRENT LIVE SCREEN



Current Evalu8 Review view, beginning with the evidence-reference fields.

04

Rate, review and retain the evaluation

Explain each degree and separate the computed grade from approval.

04 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

RATE, REVIEW AND RETAIN THE EVALUATION / F-04-01

OPEN SOURCE

Rate the eight factors

Select the highest degree fully supported by role evidence.

WHO USES THIS Trained evaluator

BEFORE YOU BEGIN

- Confirmed role facts
- Evidence references
- Adopted factor method

WHAT YOU WILL HAVE

- Eight-factor degree profile
- Factor rationale and evidence links

CHECK BEFORE YOU FINISH

- Highest fully supported degree is chosen
- Evidence is relevant to the specific factor
- Alternative ratings are explained

Two factors appear to reward the same fact	Review their definitions and exclusions; distinguish knowledge, authority, impact and stewardship before confirming degrees.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Factor controls inspected in a read-only example. No operational rating was submitted.

RATE, REVIEW AND RETAIN THE EVALUATION / STEPS 1–2 OF 6

OPEN SOURCE

Rate the eight factors

01 Open 'Factor evaluation'

Use the A–H factor controls to review each factor. Start with the factor definition, its weight and the seven whole-degree descriptions.

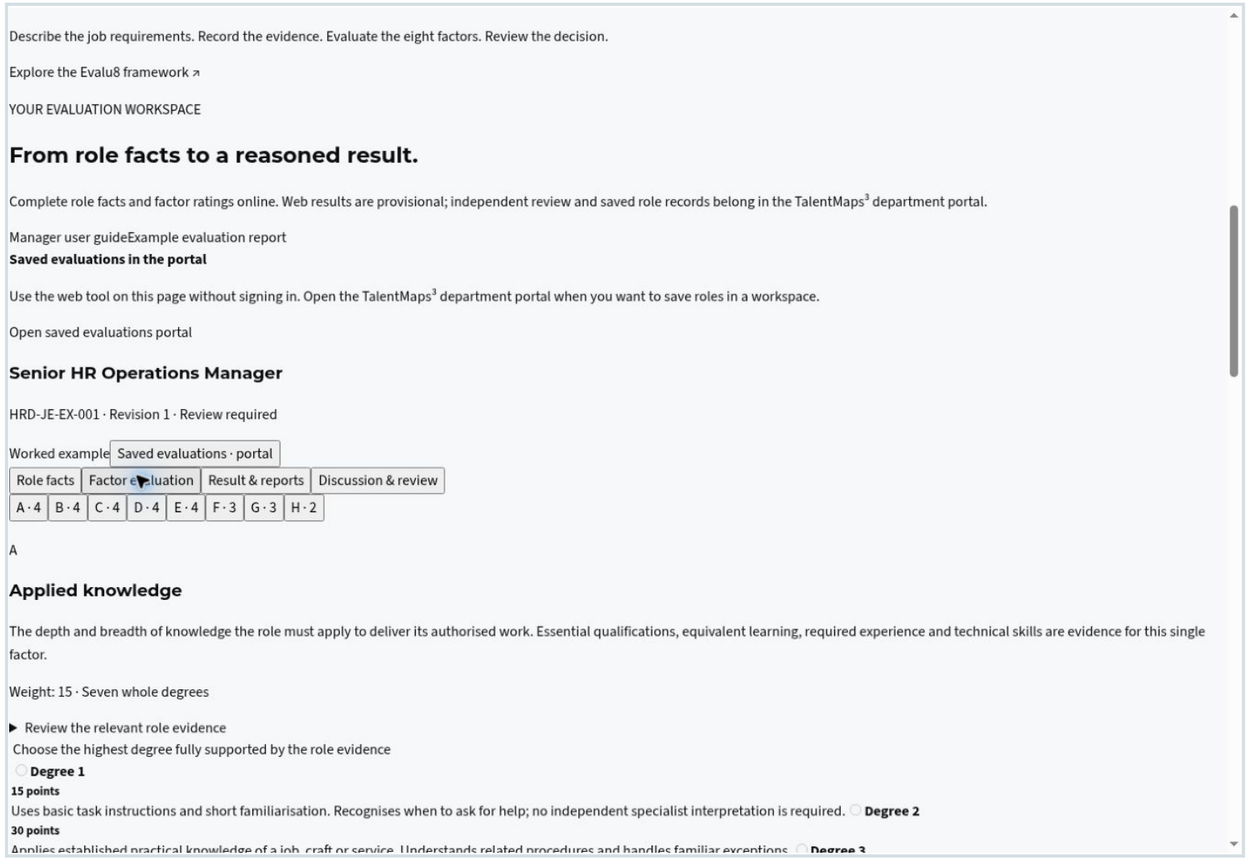
CHECK The evaluator understands the factor boundary.

02 Read relevant role evidence

Review the role evidence before choosing a degree. Essential qualifications, experience and technical skills inform Applied knowledge; they are not separate automatic point awards.

CHECK The degree selection is grounded in the role.

CURRENT LIVE SCREEN



Current Applied knowledge factor: definition, weight and the start of the degree descriptions.

RATE, REVIEW AND RETAIN THE EVALUATION / STEPS 3–4 OF 6

OPEN SOURCE

Rate the eight factors

03 Choose the supported degree

Select the highest degree whose description is fully supported. Avoid averaging adjacent degrees or choosing a desired grade first.

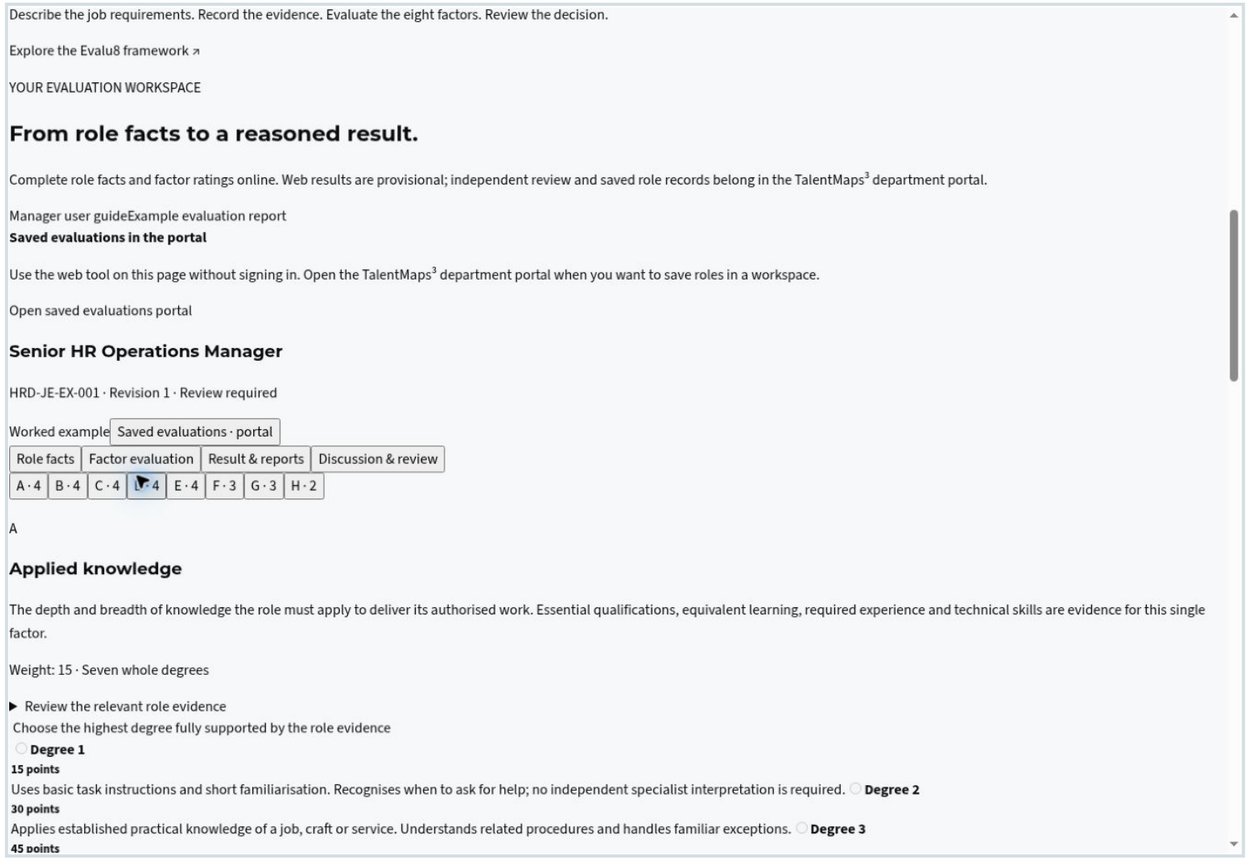
CHECK One whole degree represents the evidence for the factor.

04 Record rationale and references

Use 'Evidence and rating rationale' and identify the supporting evidence records. Explain why the next higher degree is not supported where that distinction matters.

CHECK Another reviewer can follow the reasoning.

PRIOR REVIEWED SCREEN



Prior reviewed factor view showing the method’s evidence-led structure.

RATE, REVIEW AND RETAIN THE EVALUATION / STEPS 5–6 OF 6

OPEN SOURCE

Rate the eight factors

05 Consider a credible alternative

Use the alternative-rating discussion where the evidence genuinely supports uncertainty. Review factor boundaries and exclusions to avoid double counting.

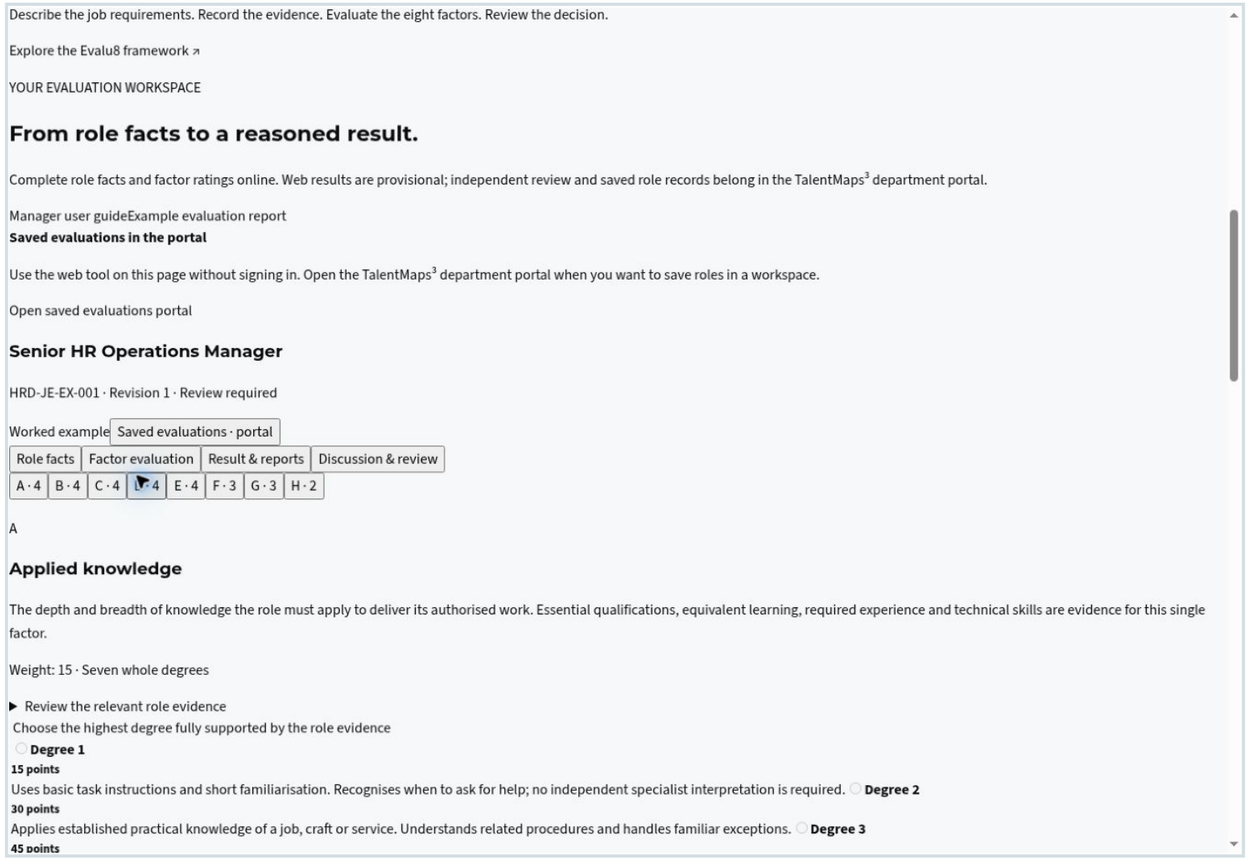
CHECK Uncertainty and boundary issues are visible.

06 Use 'Next factor' and review all eight

Complete A Applied knowledge through H Effort and working conditions, then open Result & reports.

CHECK The profile is complete and ready for independent review.

PRIOR REVIEWED SCREEN



Prior reviewed factor view showing the method's evidence-led structure.

RATE, REVIEW AND RETAIN THE EVALUATION / F-04-02

OPEN SOURCE

Read the computed grade and boundaries

Understand how the points lead to a provisional grade.

WHO USES THIS Evaluator and review panel

BEFORE YOU BEGIN

- Complete degree profile
- Rationales and evidence
- Adopted grade boundaries

WHAT YOU WILL HAVE

- Explained provisional grade
- Boundary and exception review

CHECK BEFORE YOU FINISH

- Point total reconciles
- Review status is clear
- Salary context does not alter grade

The desired grade differs from the computed grade	Review the underlying evidence and degree choices independently. Do not adjust scores merely to achieve a preferred outcome.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The scoring model is labelled 0.9 Review and pilot; the example's panel decision is pending.

RATE, REVIEW AND RETAIN THE EVALUATION / STEPS 1–2 OF 5

OPEN SOURCE

Read the computed grade and boundaries

01 Open 'Result & reports'

Read the total, computed grade, grade range and review status together. The supplied example shows 365 / 700 and Grade G7, 340–384 points.

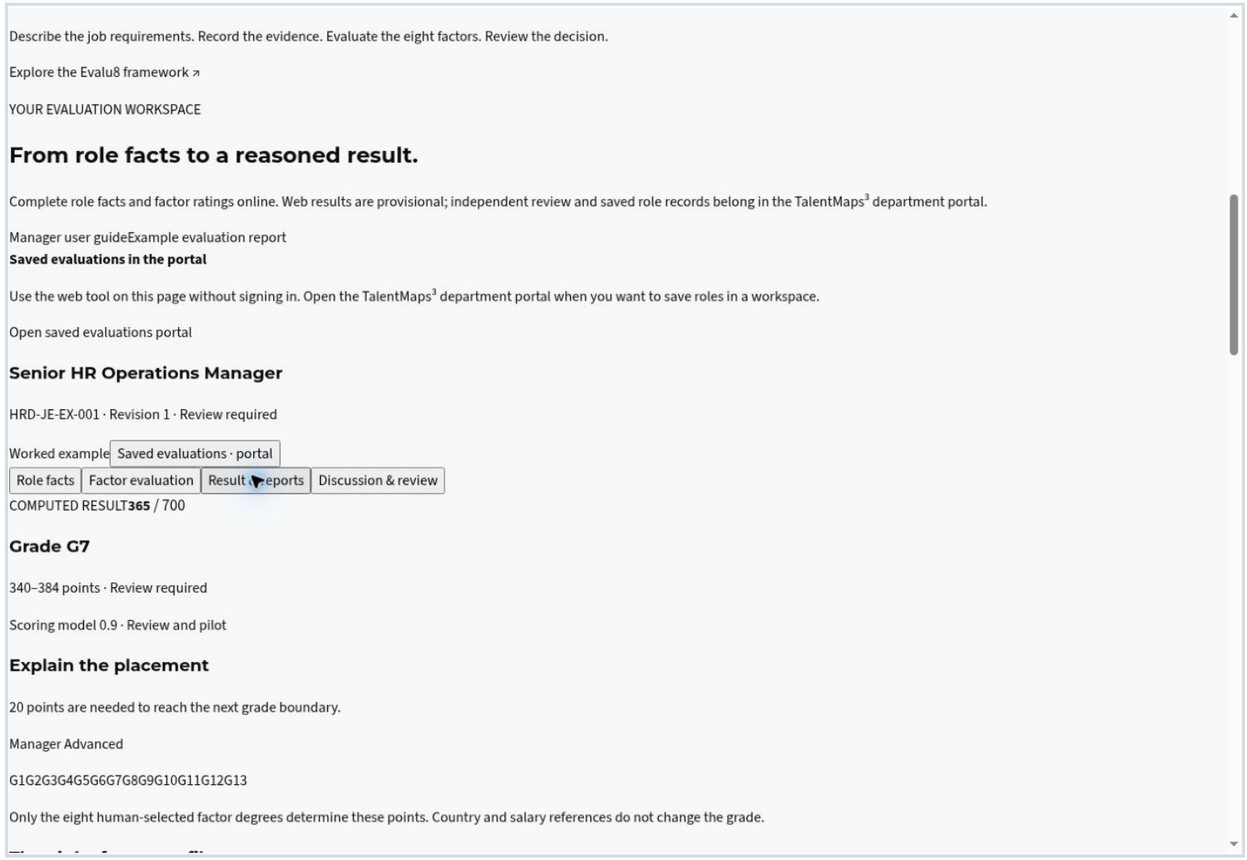
CHECK The result is clearly distinguished from its approval status.

02 Check the factor table

Reconcile Factor, Degree, Weight and Points. In the example, degrees 4,4,4,4,4,3,3,2 produce 365 points.

CHECK The arithmetic can be traced to the selected degrees.

CURRENT LIVE SCREEN



Current 365-point, Grade G7 supplied result with Review required.

RATE, REVIEW AND RETAIN THE EVALUATION / STEPS 3–4 OF 5

OPEN SOURCE

Read the computed grade and boundaries

03 Review the boundary explanation

Read Explain the placement. The example is 20 points below the next grade boundary; this is a sensitivity question, not a target to reach.

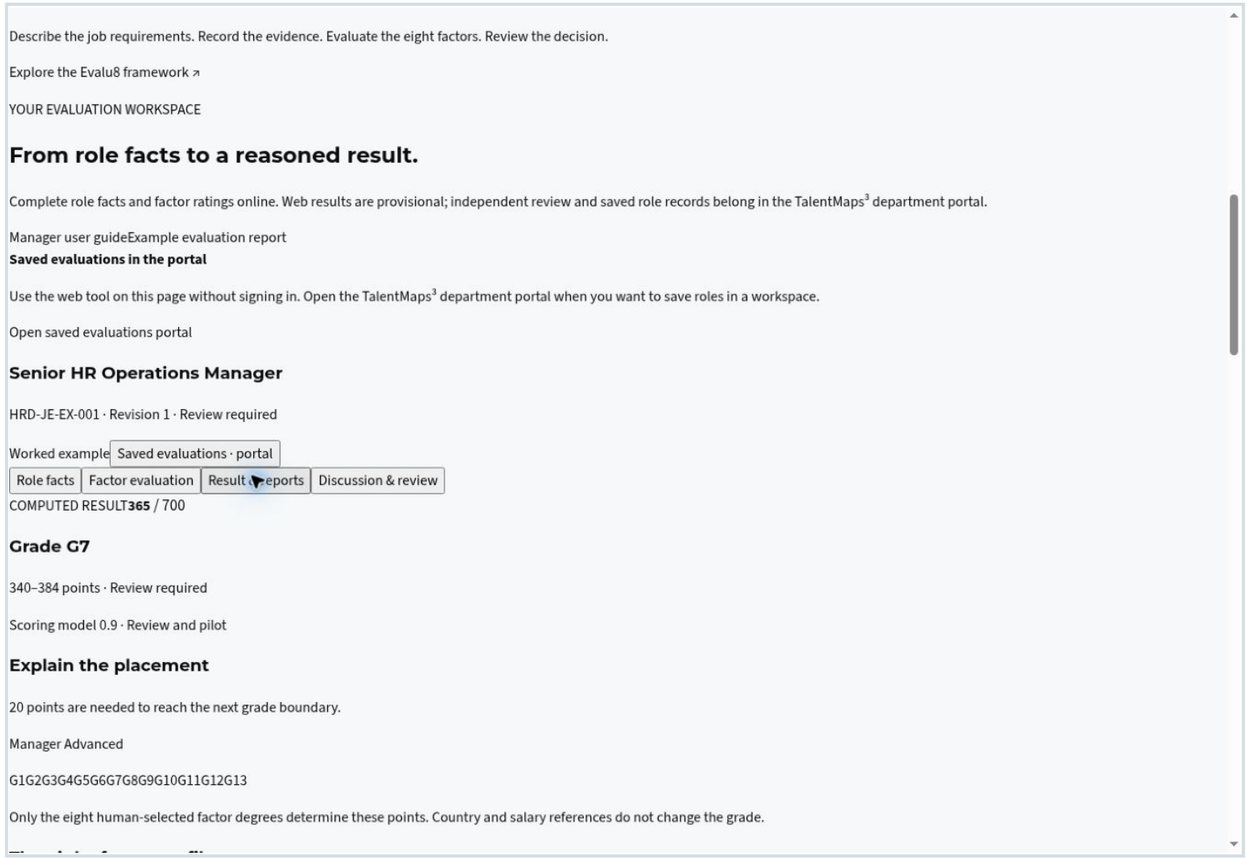
CHECK The panel understands the proximity to another grade.

04 Check capability and exceptions

Review maturity reference, core technical mix and any validation or source exception. A clear validation message does not itself approve the evaluation.

CHECK Potential inconsistencies are considered before decision.

CURRENT LIVE SCREEN



Current 365-point, Grade G7 supplied result with Review required.

RATE, REVIEW AND RETAIN THE EVALUATION / STEPS 5–5 OF 5

OPEN SOURCE

Read the computed grade and boundaries

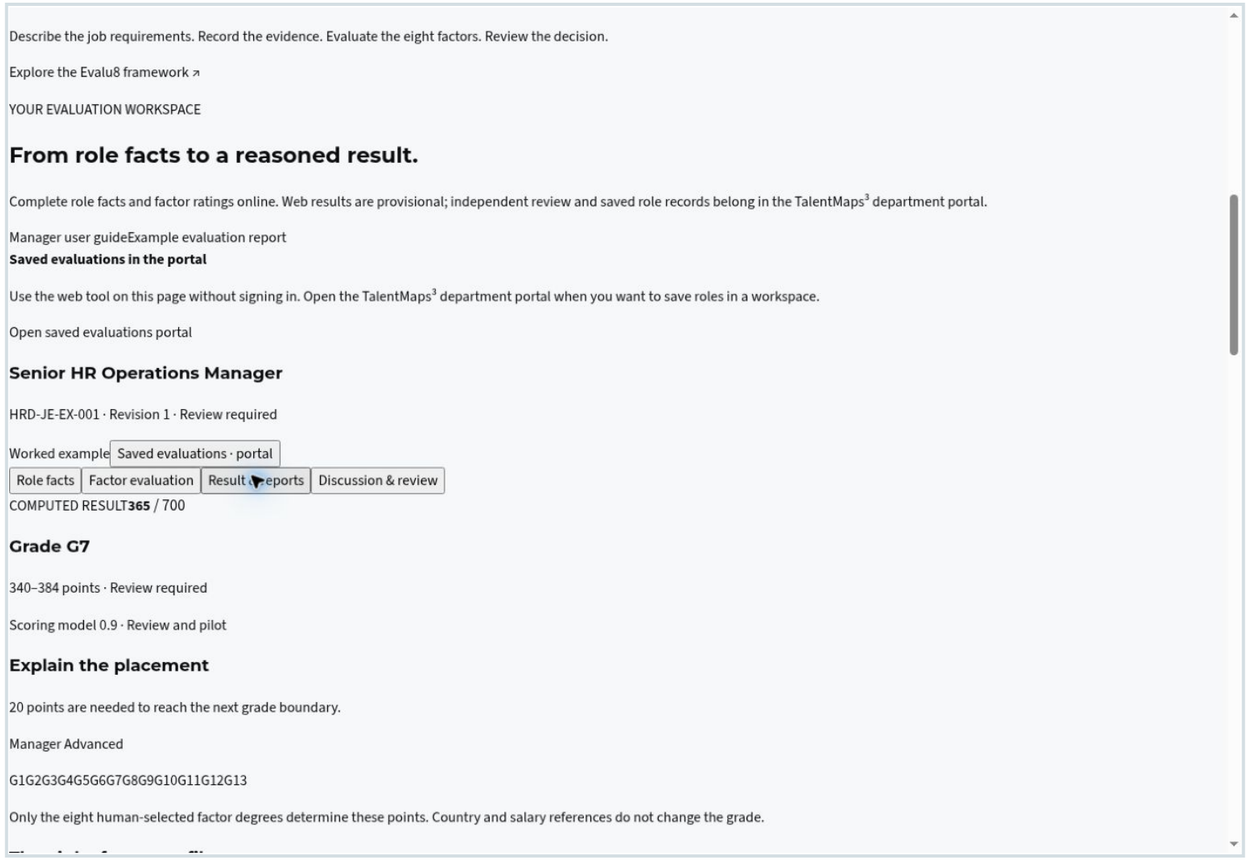
05

Keep salary context separate

Read the country salary context as an accompanying reference. The page explicitly says only the eight selected factor degrees determine the points.

CHECK The grade is not changed by country or salary figures.

CURRENT LIVE SCREEN



Current 365-point, Grade G7 supplied result with Review required.

RATE, REVIEW AND RETAIN THE EVALUATION / F-04-03

OPEN SOURCE

Complete independent review

Keep factual verification and the panel decision distinct.

WHO USES THIS Independent reviewer or evaluation panel

BEFORE YOU BEGIN

- Completed evaluation
- Source evidence
- Appropriate independent authority

WHAT YOU WILL HAVE

- Evidence verification
- Independent panel decision and rationale

CHECK BEFORE YOU FINISH

- Reviewer is appropriately independent
- Evidence is actually verified
- Pending is not represented as approved

A reviewer is also the evaluator Use the organisation’s independent review route and do not self-approve the evaluation.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Review fields are visible in the supplied example; private approval transactions were not tested.

RATE, REVIEW AND RETAIN THE EVALUATION / STEPS 1–2 OF 5

OPEN SOURCE

Complete independent review

01 Open 'Discussion & review'

Review the evidence-verification area and the statement that an evaluator cannot approve their own evaluation.

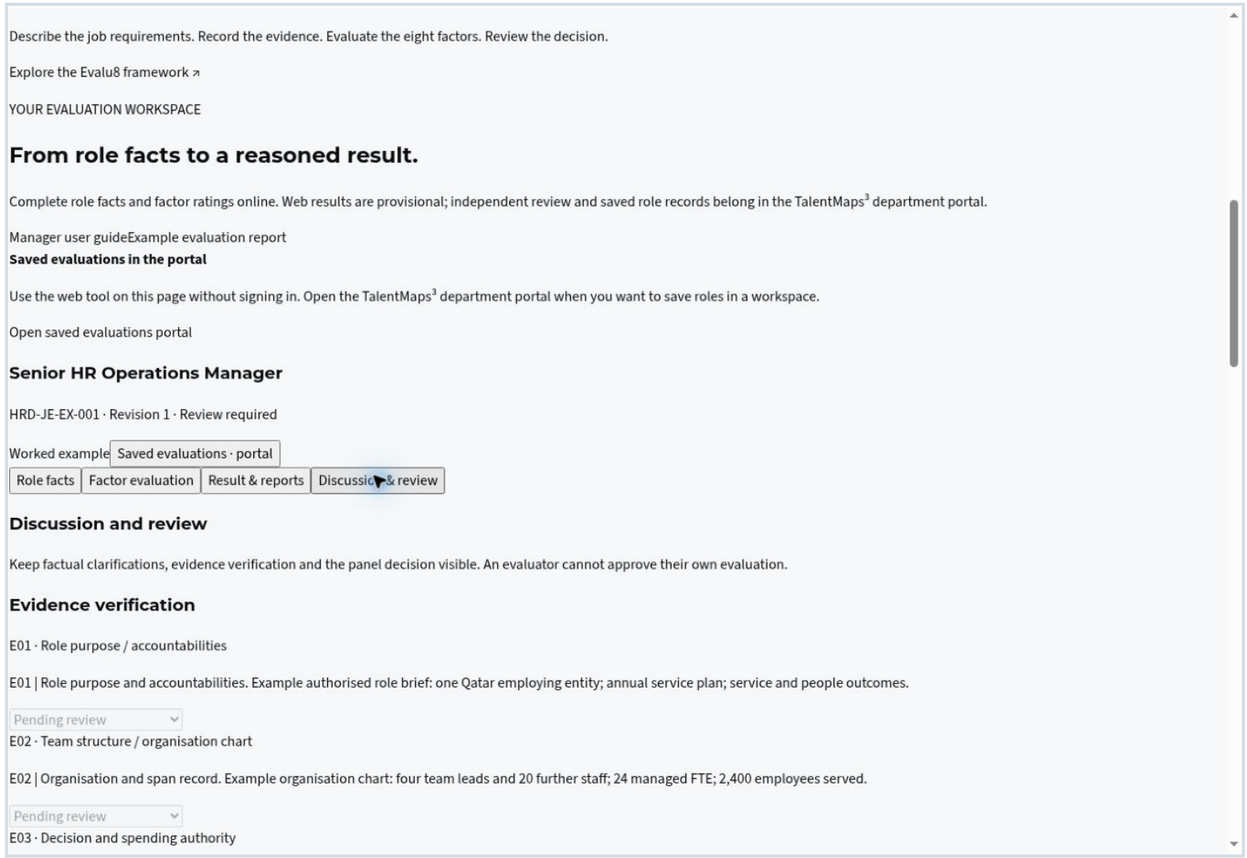
CHECK The review responsibility is independent of the evaluator.

02 Verify each evidence category

Compare each E01–E07 reference with the actual source. Use Confirmed from evidence only when the underlying facts have been checked.

CHECK Evidence status reflects real verification.

CURRENT LIVE SCREEN



Current read-only Discussion and review view, showing evidence-verification entries marked Pending review.

RATE, REVIEW AND RETAIN THE EVALUATION / STEPS 3–4 OF 5

OPEN SOURCE

Complete independent review

03 Check qualification and capability exceptions

Review qualification/experience verification and any G1/G2 unspecified-core review where applicable. Resolve relevant inconsistencies before decision.

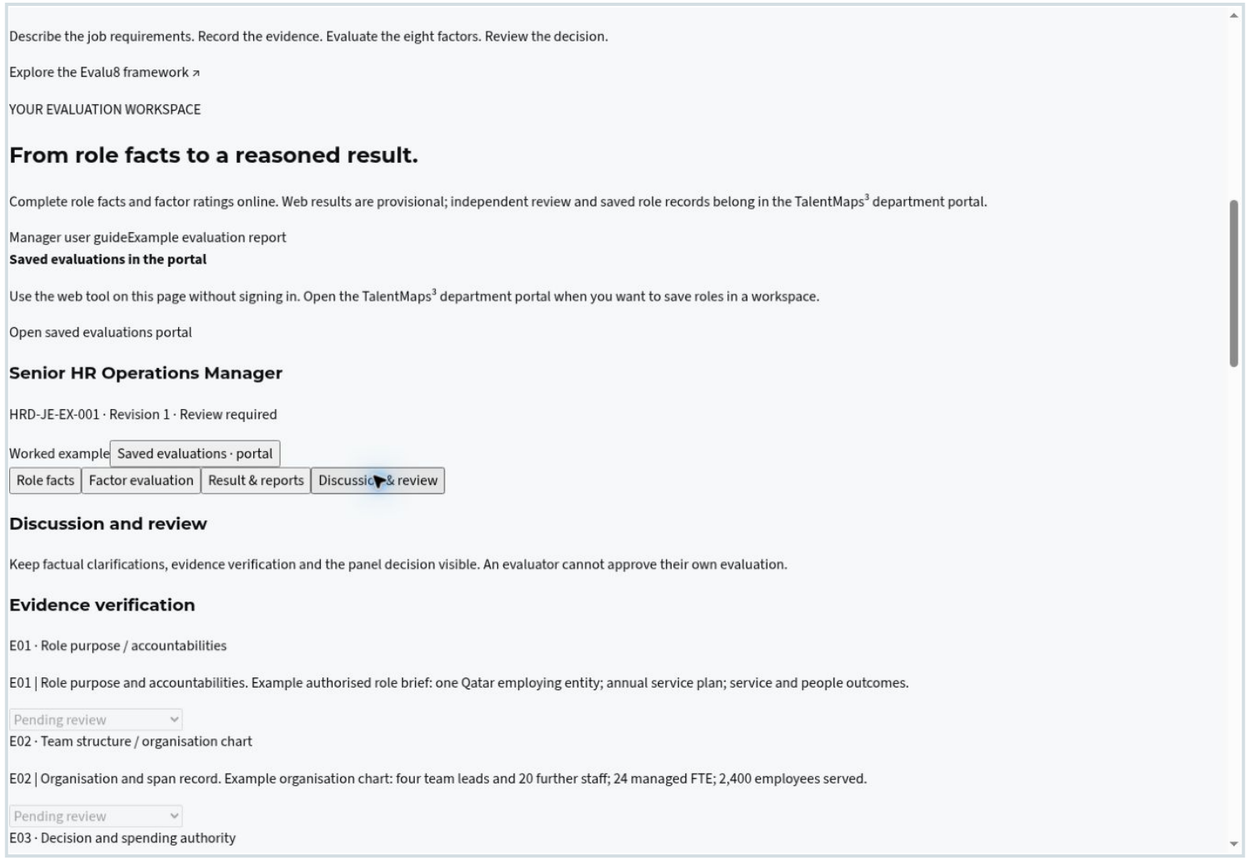
CHECK Required exception checks are addressed.

04 Consider comparators and alternative ratings

Review comparable evaluated roles and the boundary/alternative-rating conclusion. Explain why the chosen profile remains appropriate.

CHECK The decision is considered in a consistent evaluation context.

CURRENT LIVE SCREEN



Current read-only Discussion and review view, showing evidence-verification entries marked Pending review.

RATE, REVIEW AND RETAIN THE EVALUATION / STEPS 5–5 OF 5

OPEN SOURCE

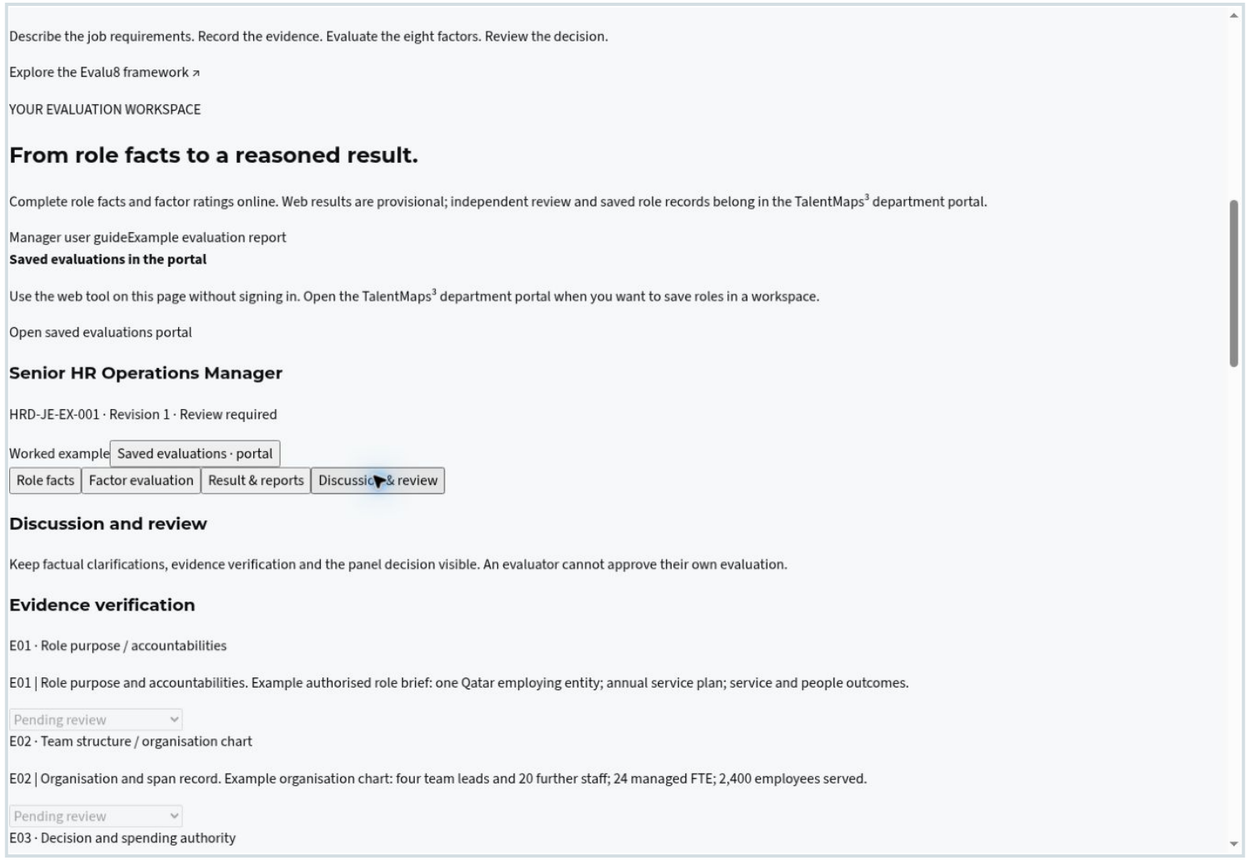
Complete independent review

05 Record the authorised panel decision

Use the supported private review process to retain the outcome and rationale. The supplied worked example remains Pending and cannot be treated as an approved grade.

CHECK The final decision has clear authority and evidence.

CURRENT LIVE SCREEN



Current read-only Discussion and review view, showing evidence-verification entries marked Pending review.

RATE, REVIEW AND RETAIN THE EVALUATION / F-04-04

OPEN SOURCE

Generate reports and keep saved evaluations

Retain the right output and understand session-only work.

WHO USES THIS Evaluator or authorised administrator

BEFORE YOU BEGIN

- Reviewed evaluation state
- Approved storage location
- Required report audience

WHAT YOU WILL HAVE

- Evaluation report preview/PDF where permitted
- Editable workbook where permitted
- Saved portal record when configured

CHECK BEFORE YOU FINISH

- File actually exists after download
- Review status remains visible
- Correct record/version is retained

The report preview opens but no file appears	Use the permitted download route and check access; do not assume the viewer automatically saved the report.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Public reader inspected; protected saving, file generation and approval were not end-to-end verified.

RATE, REVIEW AND RETAIN THE EVALUATION / STEPS 1–2 OF 5

OPEN SOURCE

Generate reports and keep saved evaluations

01 Use 'Generate evaluation report'

From Result & reports, open the report preview. Check role reference, version, grade, evidence, status and salary context before sharing.

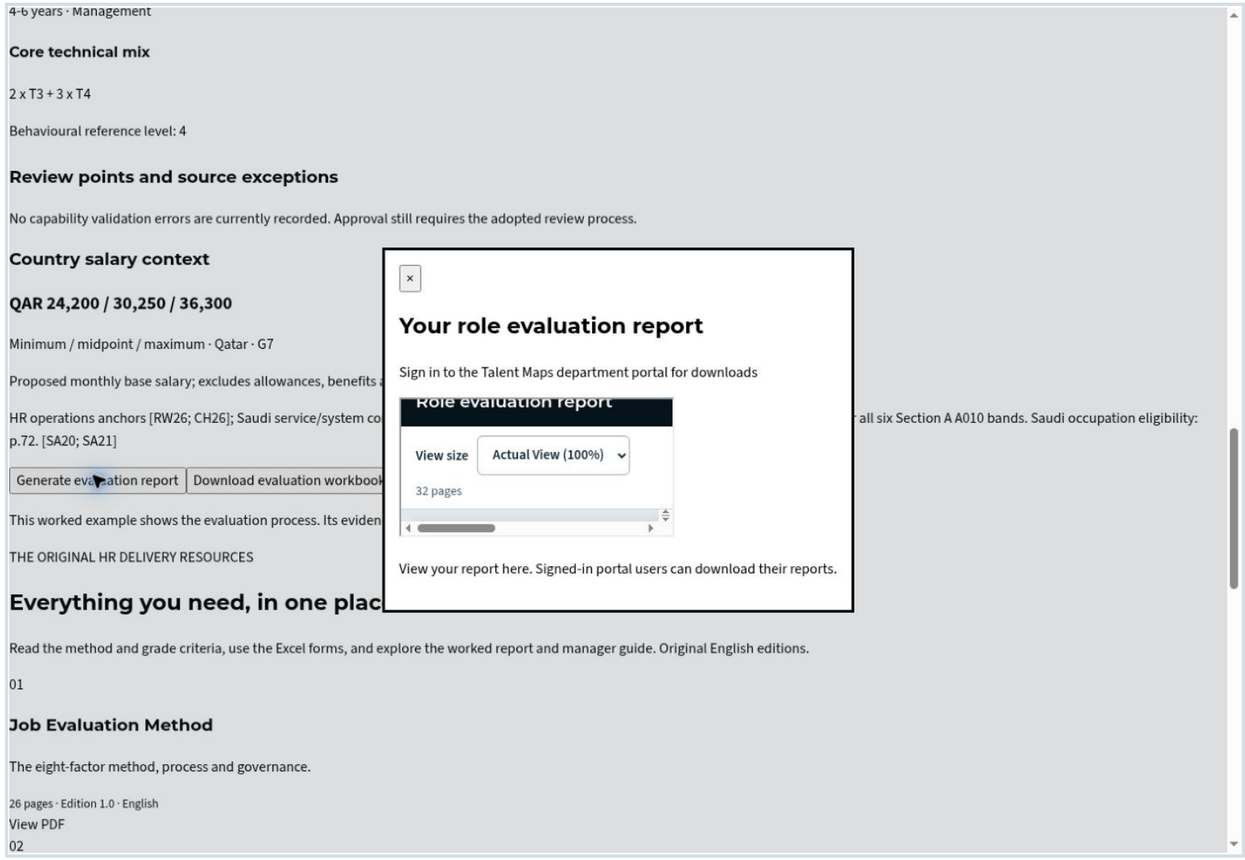
CHECK The report reflects the evaluation being discussed.

02 Use 'Download evaluation workbook' where permitted

Retain an editable workbook when the supported output is available. Confirm that the downloaded file opens and represents the intended evaluation.

CHECK An editable output can be checked independently.

PRIOR REVIEWED SCREEN



Public report preview; preview and permitted download are separate actions.

RATE, REVIEW AND RETAIN THE EVALUATION / STEPS 3–4 OF 5

OPEN SOURCE

Generate reports and keep saved evaluations

03 Distinguish preview from download

The prior public review opened an in-page report reader whose download route required sign-in. Do not assume a preview has saved a local file.

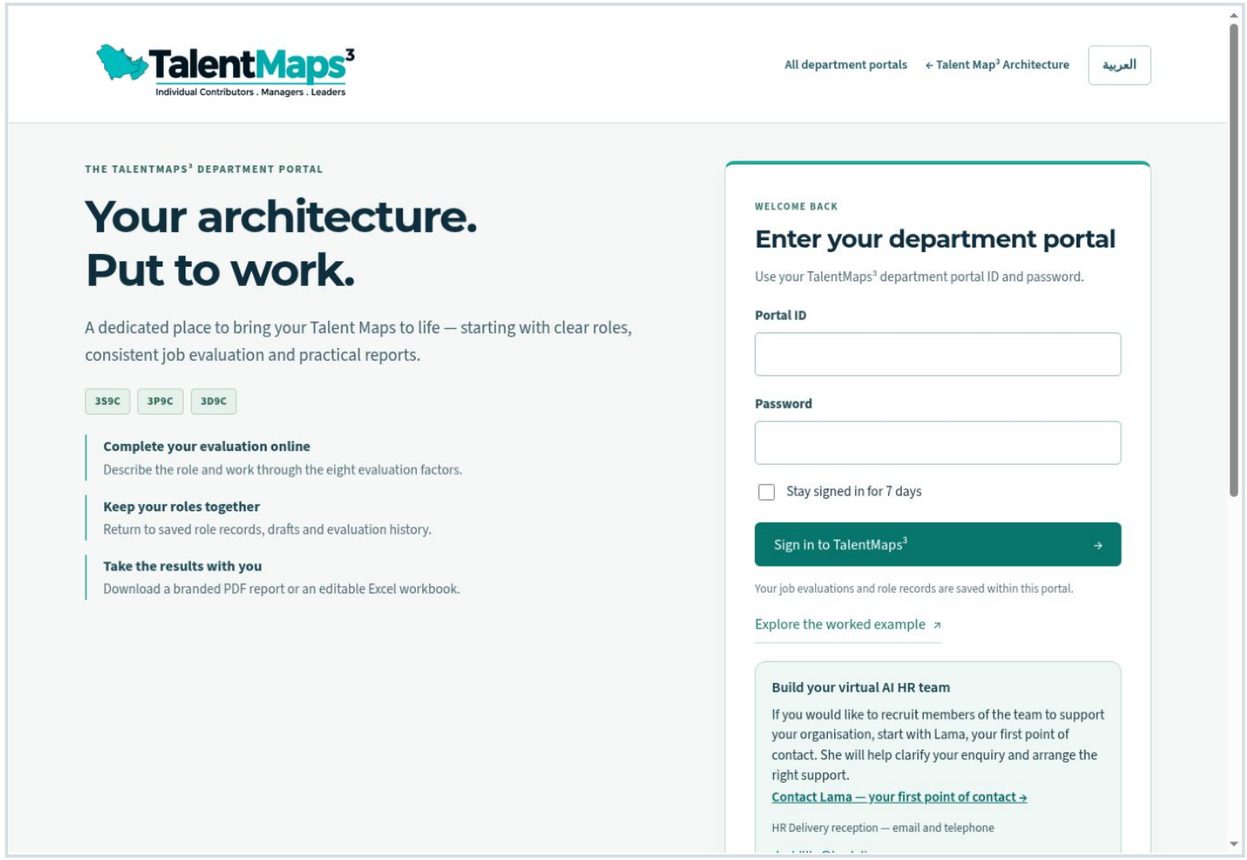
CHECK The user knows whether an actual output file exists.

04 Use 'Open saved evaluations portal'

Enter the authorised TalentMaps workspace when roles and evaluation history must be retained. Confirm the current workspace and record-save controls.

CHECK Persistent role records use the appropriate portal route.

CURRENT LIVE SCREEN



Saved evaluations use the protected TalentMaps entry.

RATE, REVIEW AND RETAIN THE EVALUATION / STEPS 5–5 OF 5

OPEN SOURCE

Generate reports and keep saved evaluations

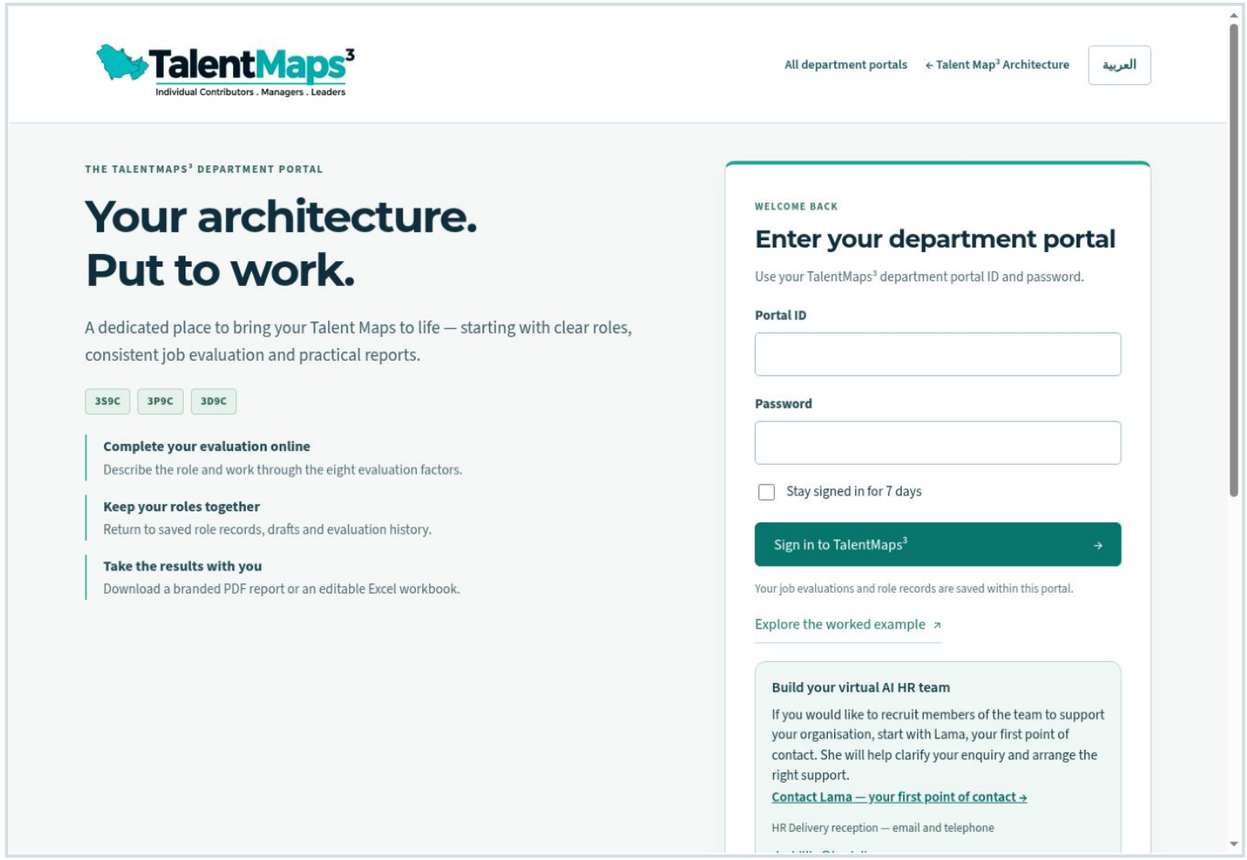
05

Preserve version and review status

Keep draft, provisional and approved outputs distinguishable, with the role reference and effective date. Public session work is not a substitute for the saved record.

CHECK The organisation can identify the current authorised version.

CURRENT LIVE SCREEN



Saved evaluations use the protected TalentMaps entry.

05 Run the performance cycle

Connect objectives, evidence, review and development.

03 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

RUN THE PERFORMANCE CYCLE / F-05-01

OPEN SOURCE

Prepare strategy-linked objectives

Translate organisational priorities into clear role contribution.

WHO USES THIS Manager with employee

BEFORE YOU BEGIN

- Relevant strategy priorities
- Approved role responsibilities
- Review period and measures

WHAT YOU WILL HAVE

- Agreed role objectives
- Measures, dates and dependencies

CHECK BEFORE YOU FINISH

- Strategy link is meaningful
- Measures and timeframe are clear
- Objectives are within appropriate influence

A draft objective is too generic	Specify the work outcome, evidence and date with the employee before retaining it as an agreed objective.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The public portal declares objective-setting/performance scope; exact private generator controls remain unverified.

RUN THE PERFORMANCE CYCLE / STEPS 1–2 OF 5

OPEN SOURCE

Prepare strategy-linked objectives

01 Clarify the strategy link

Identify which organisational outcomes the role can influence and what its approved responsibilities require. Select a manageable number of priorities.

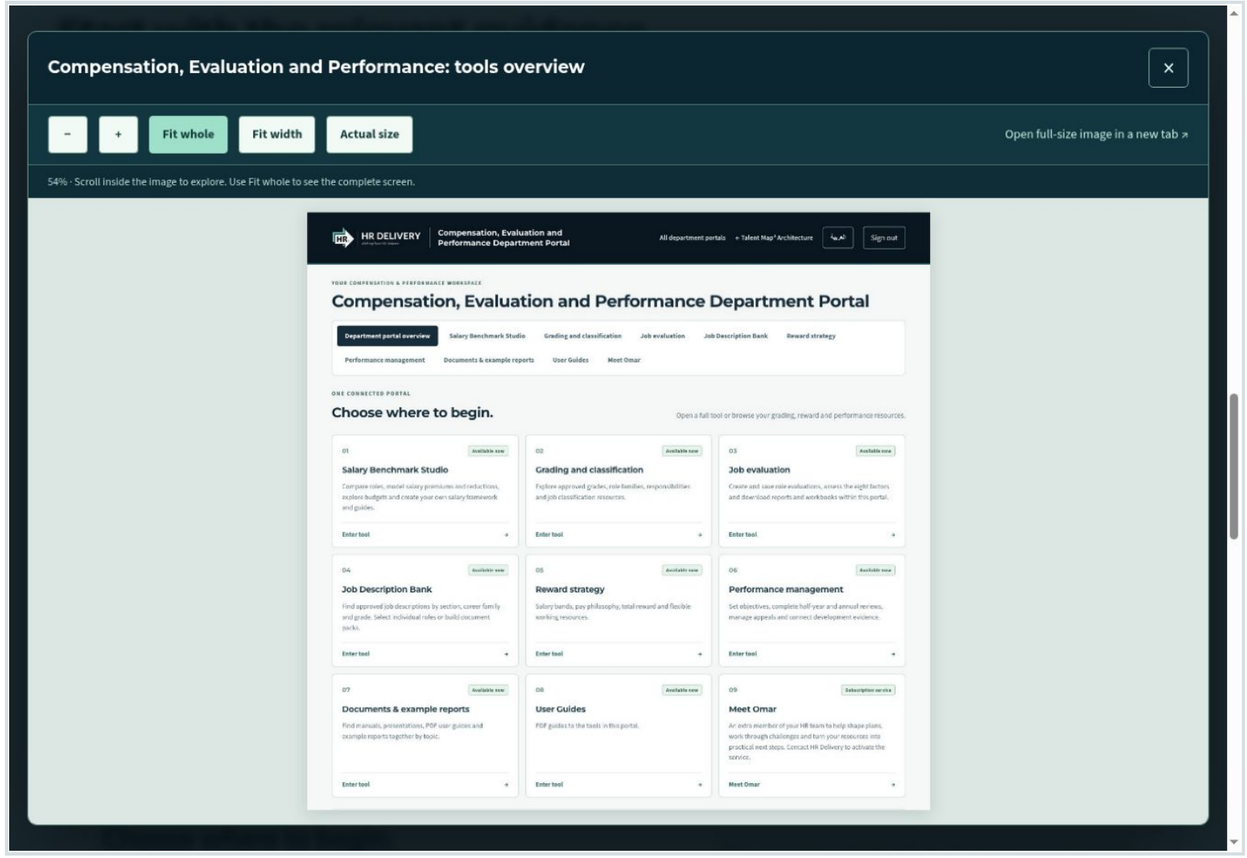
CHECK The objective set has a clear business purpose.

02 Use the described Objectives Generator

Enter the authorised portal objective-setting route and confirm the actual generator fields. The exact private generator screen was not inspected.

CHECK The drafting process uses the intended role and strategy context.

PUBLISHED DEMONSTRATION



Published Compensation, Evaluation and Performance demonstration; private records and controls were not transaction-tested.

RUN THE PERFORMANCE CYCLE / STEPS 3–4 OF 5

OPEN SOURCE

Prepare strategy-linked objectives

03 Specify the expected result

For each draft objective, define the outcome, measure/evidence, timeframe and relevant dependencies. Avoid a task list without a clear result.

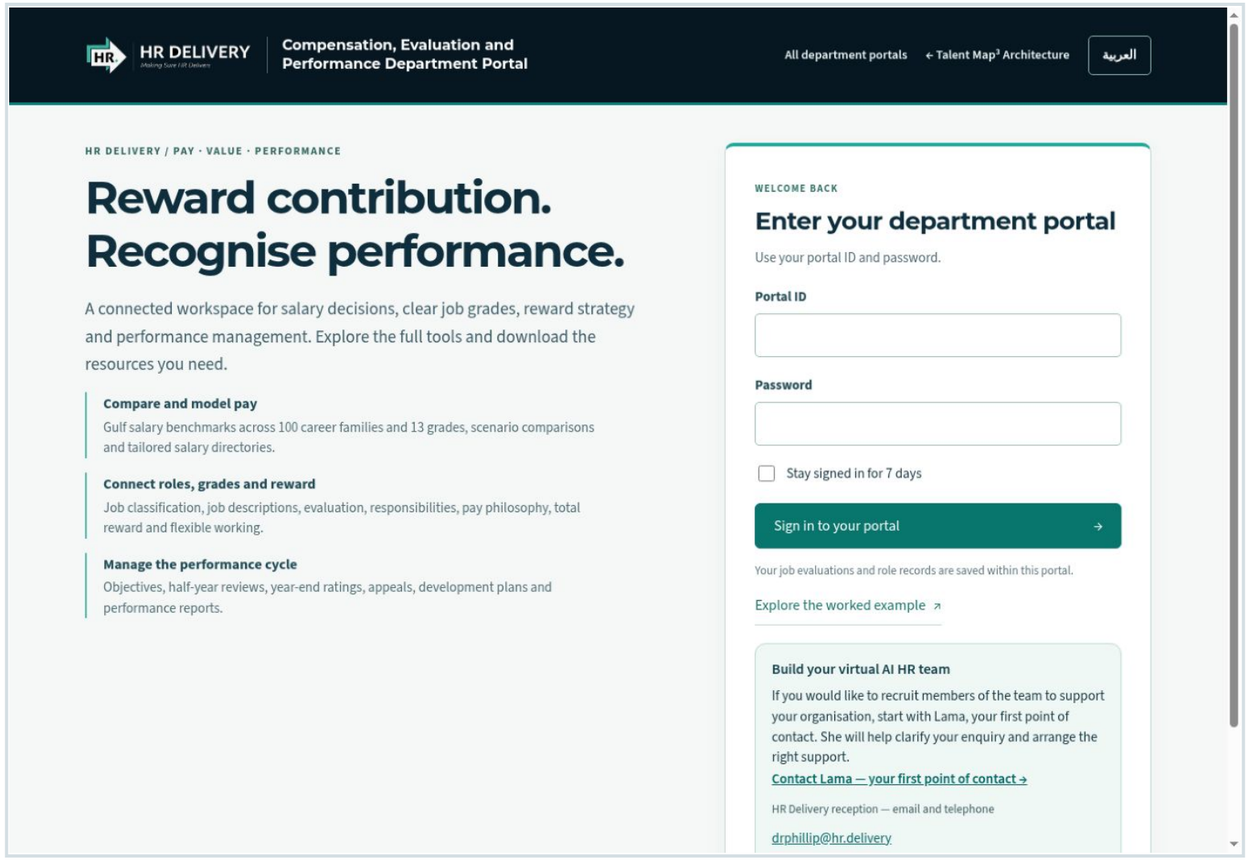
CHECK The employee can understand what successful contribution looks like.

04 Check control and feasibility

Review whether the employee can influence the result, what support is needed and how changing circumstances will be handled.

CHECK Objectives are realistic and fairly attributable.

CURRENT LIVE SCREEN



Current portal entry describes objectives, half-year reviews, year-end ratings and development plans.

RUN THE PERFORMANCE CYCLE / STEPS 5–5 OF 5

OPEN SOURCE

Prepare strategy-linked objectives

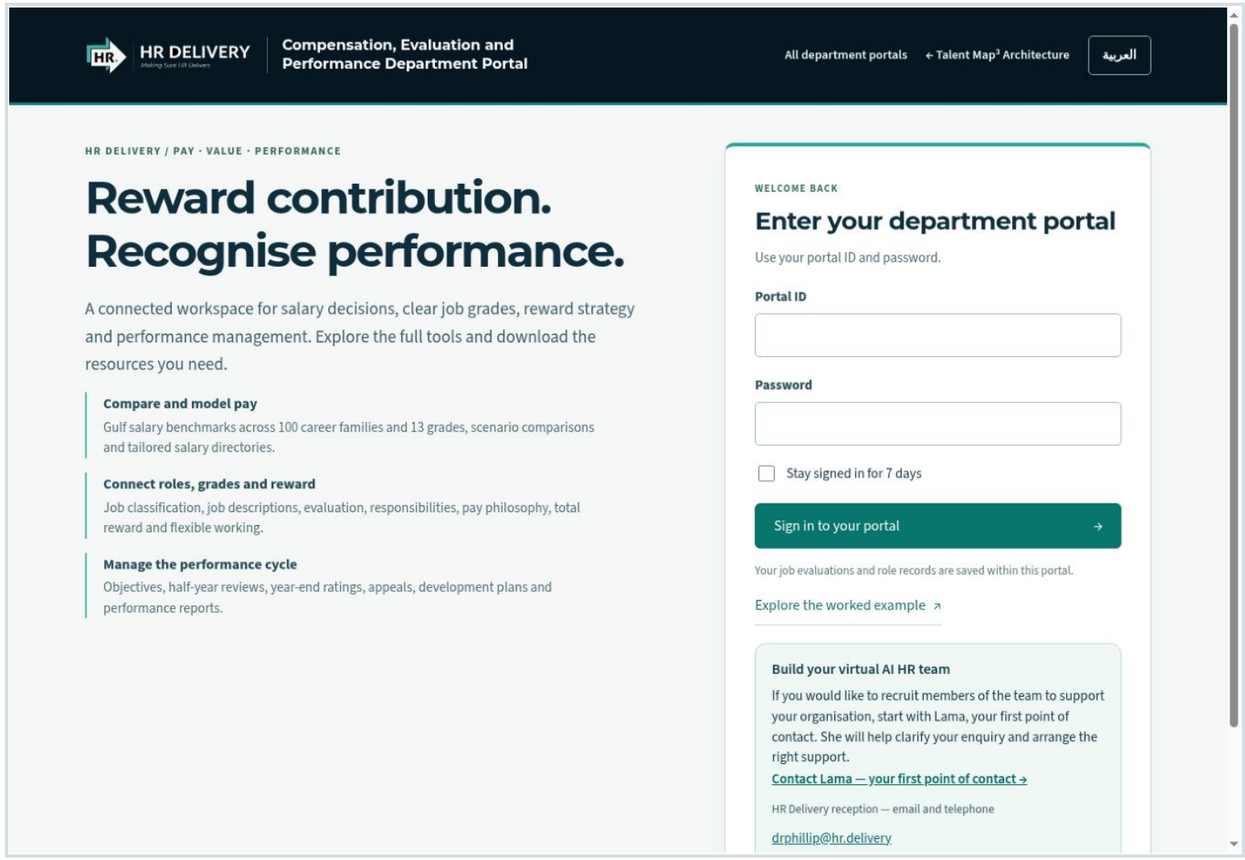
05

Agree and retain the objectives

Discuss and refine the wording with the employee, then use the supported approval/record process. Keep the agreed version available for later reviews.

CHECK The performance cycle starts from shared expectations.

CURRENT LIVE SCREEN



Current portal entry describes objectives, half-year reviews, year-end ratings and development plans.

RUN THE PERFORMANCE CYCLE / F-05-02

OPEN SOURCE

Prepare and conduct the half-year review

Use evidence to discuss progress and adjust support.

WHO USES THIS Manager and employee

BEFORE YOU BEGIN

- Agreed objectives
- Relevant work evidence
- Development actions and changed circumstances

WHAT YOU WILL HAVE

- Half-year review record
- Support and development actions

CHECK BEFORE YOU FINISH

- Evidence covers the review period
- Changes are justified and recorded
- Follow-up responsibilities are clear

The review becomes a discussion of impressions

Return to agreed objectives and concrete examples, and identify what further evidence is needed.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Private performance review forms, save behaviour and notifications were not inspected.

RUN THE PERFORMANCE CYCLE / STEPS 1–2 OF 5

OPEN SOURCE

Prepare and conduct the half-year review

01 Review the agreed baseline

Open the employee's authorised performance record and confirm the review period and agreed objectives. Private record controls require local confirmation.

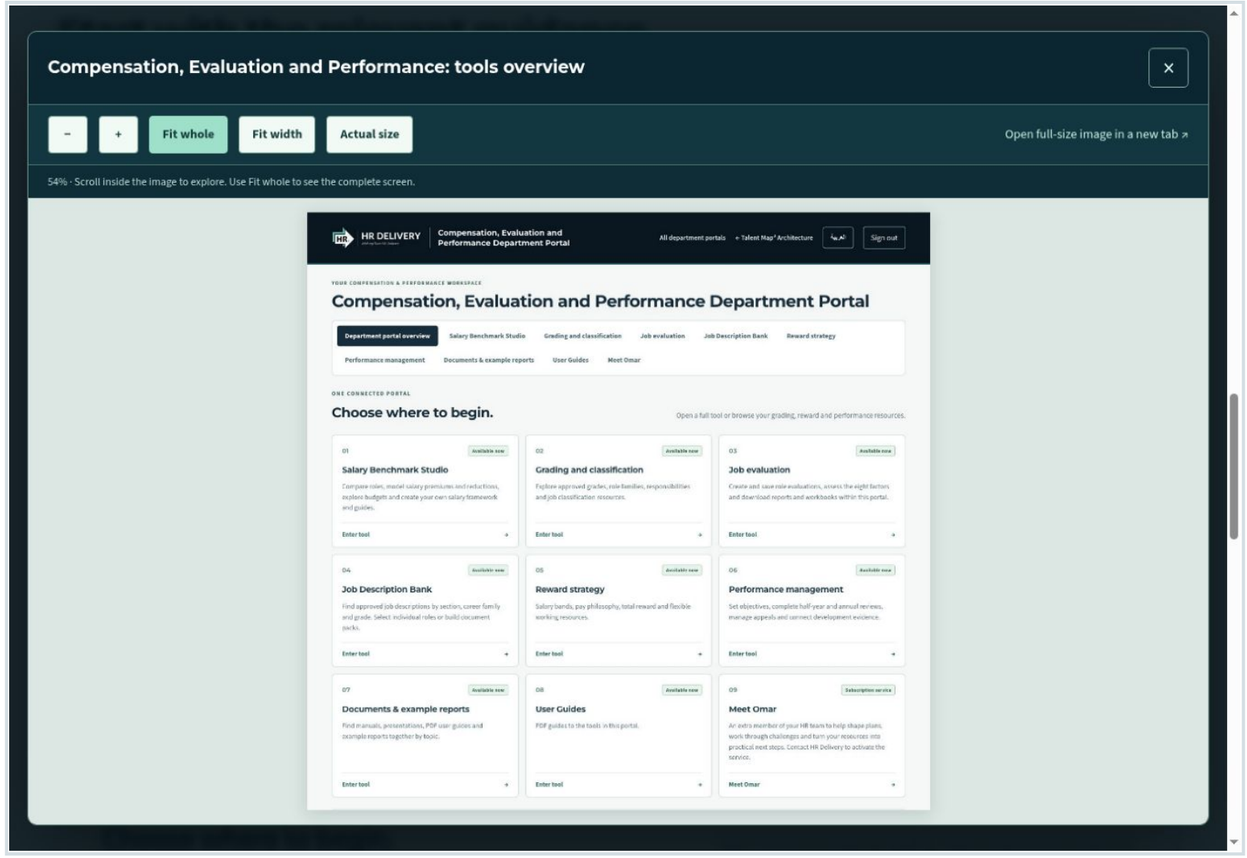
CHECK The discussion uses the correct expectations and period.

02 Gather balanced evidence

Bring examples of outcomes, behaviours, constraints and feedback. Separate completed results from activity still in progress.

CHECK Progress can be discussed against actual evidence.

PUBLISHED DEMONSTRATION



Published Compensation, Evaluation and Performance demonstration; private records and controls were not transaction-tested.

RUN THE PERFORMANCE CYCLE / STEPS 3–4 OF 5

OPEN SOURCE

Prepare and conduct the half-year review

03 Discuss progress and barriers

Review what is working, where delivery is at risk and what support or clarification would help. Invite the employee's perspective.

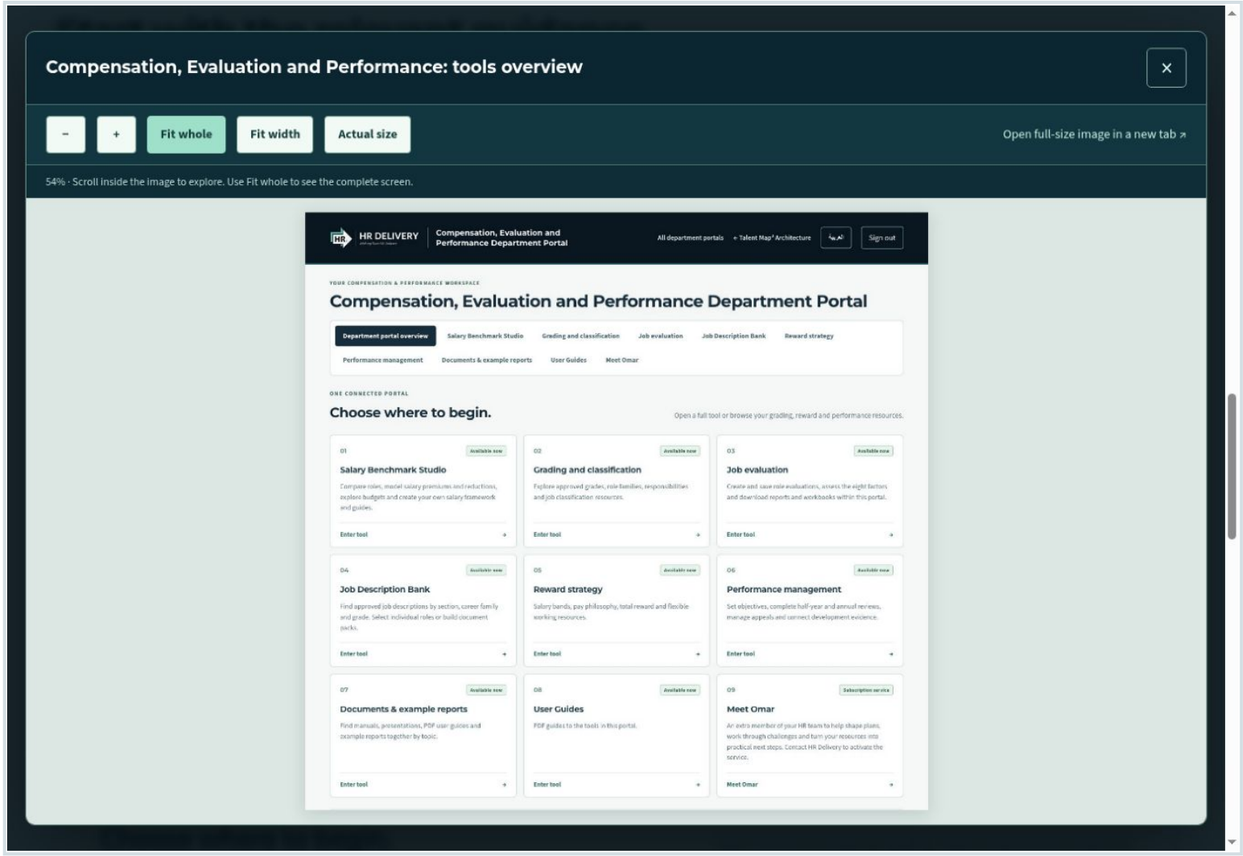
CHECK The conversation identifies practical next actions.

04 Agree justified changes

When priorities or circumstances change, document the reason and any revised expectations through the supported process. Do not rewrite objectives retrospectively to fit results.

CHECK Changes are explicit and understandable.

PUBLISHED DEMONSTRATION



Published Compensation, Evaluation and Performance demonstration; private records and controls were not transaction-tested.

RUN THE PERFORMANCE CYCLE / STEPS 5–5 OF 5

OPEN SOURCE

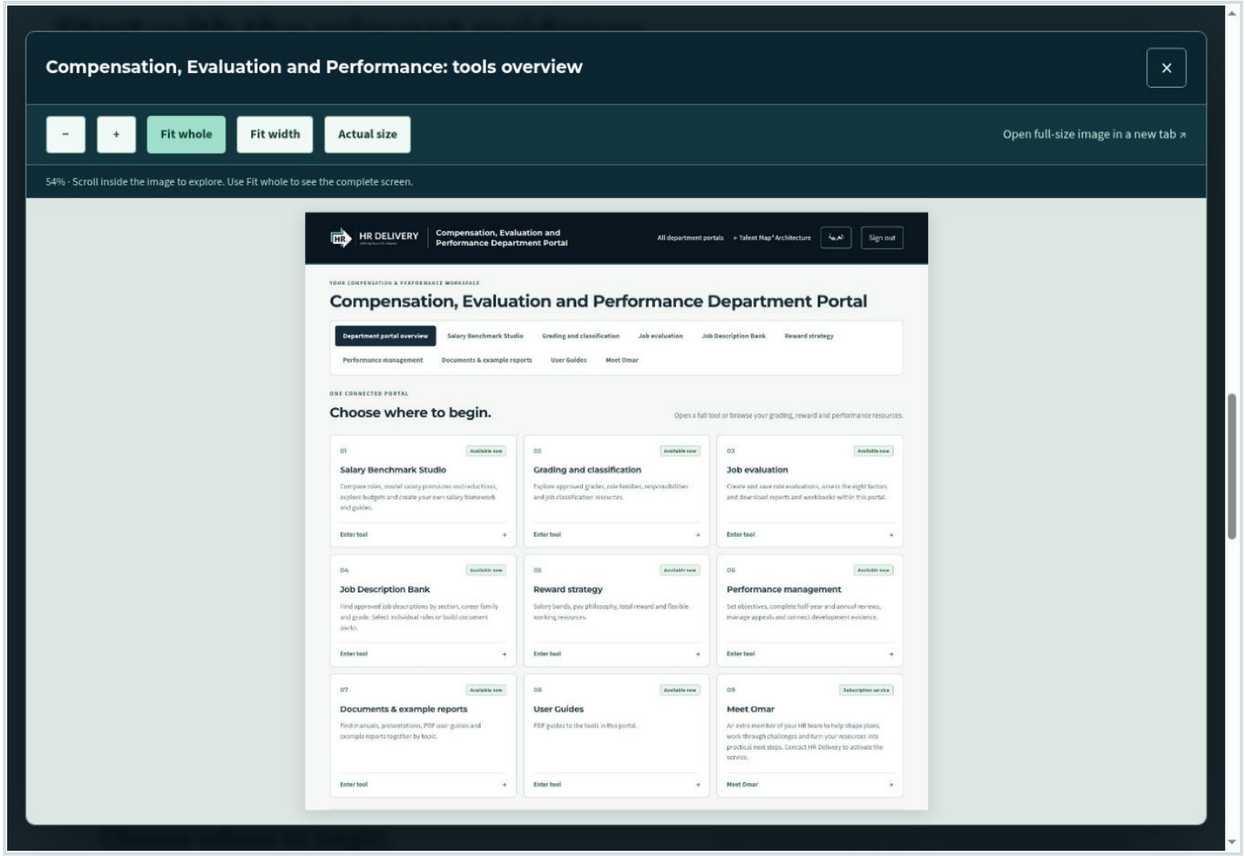
Prepare and conduct the half-year review

05 Record development and follow-up

Agree actions, owners and review dates. Keep the record concise enough to support the next conversation.

CHECK The review improves the remaining performance period.

PUBLISHED DEMONSTRATION



Published Compensation, Evaluation and Performance demonstration; private records and controls were not transaction-tested.

RUN THE PERFORMANCE CYCLE / F-05-03

OPEN SOURCE

Complete year-end review, rating and appeal

Retain a reasoned performance decision and an understandable review route.

WHO USES THIS Manager, employee and authorised reviewer

BEFORE YOU BEGIN

- Agreed rating approach
- Evidence for the complete period
- Organisation’s review and appeal process

WHAT YOU WILL HAVE

- Year-end review and rating rationale
- Appeal record if used
- Next-cycle development priorities

CHECK BEFORE YOU FINISH

- Rating criteria are consistent
- Employee perspective is represented appropriately
- Reports use the authorised audience

A rating is disputed	Use the stated appeal/review route with specific evidence and avoid changing records informally outside the adopted process.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected year-end, appeal and performance-report controls were not inspected.

RUN THE PERFORMANCE CYCLE / STEPS 1–2 OF 5

OPEN SOURCE

Complete year-end review, rating and appeal

01 Review the whole period

Consider the agreed objectives, changes, outcomes and relevant behavioural evidence. Avoid allowing the most recent event to dominate the judgement.

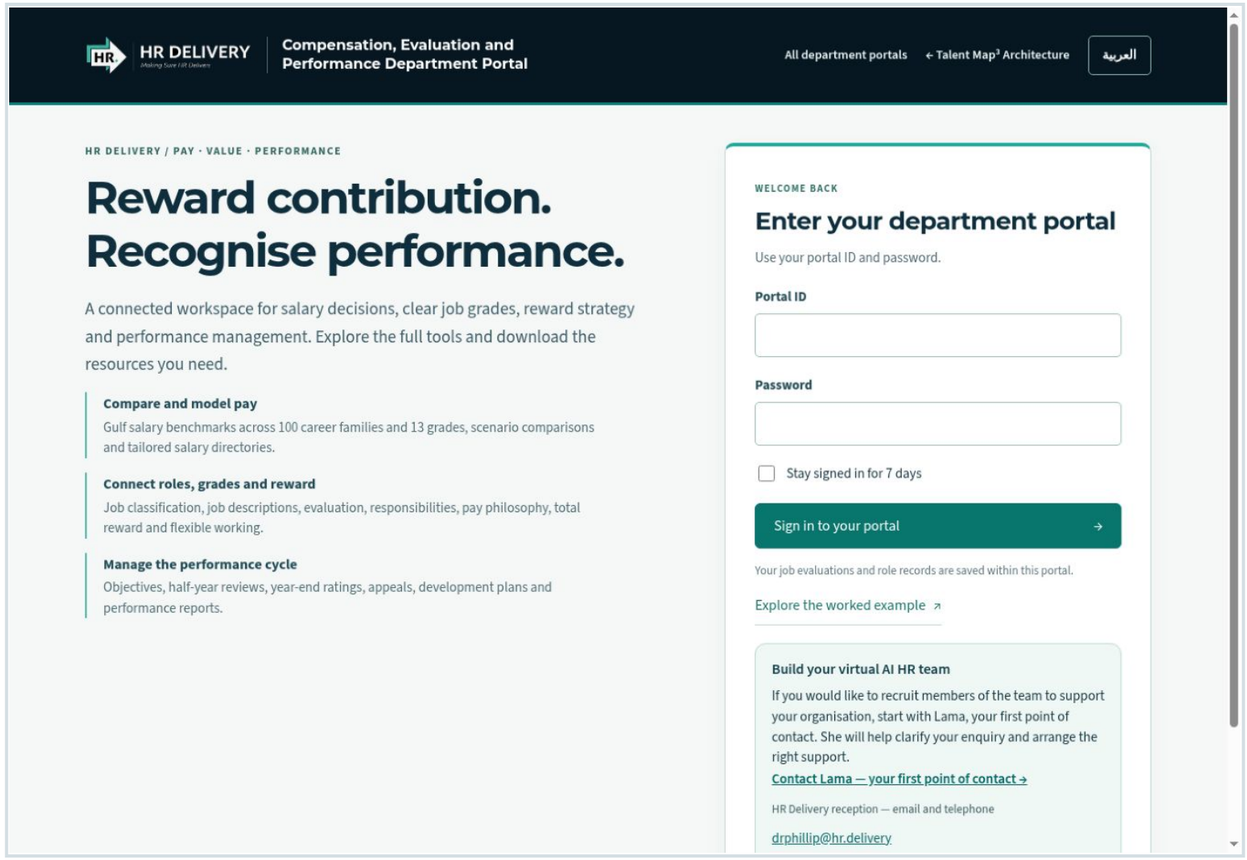
CHECK The review covers the period fairly and completely.

02 Apply the adopted rating criteria

Use the organisation’s approved descriptors and review process. Explain the evidence supporting the proposed rating rather than relying on a score alone.

CHECK The rating is traceable to the adopted criteria.

CURRENT LIVE SCREEN



The current performance portal entry names ratings, appeals, development plans and reports.

RUN THE PERFORMANCE CYCLE / STEPS 3–4 OF 5

OPEN SOURCE

Complete year-end review, rating and appeal

03 Record the review outcome

Use the supported year-end record and authorisation route. Keep the employee's perspective and any unresolved issue visible according to the process.

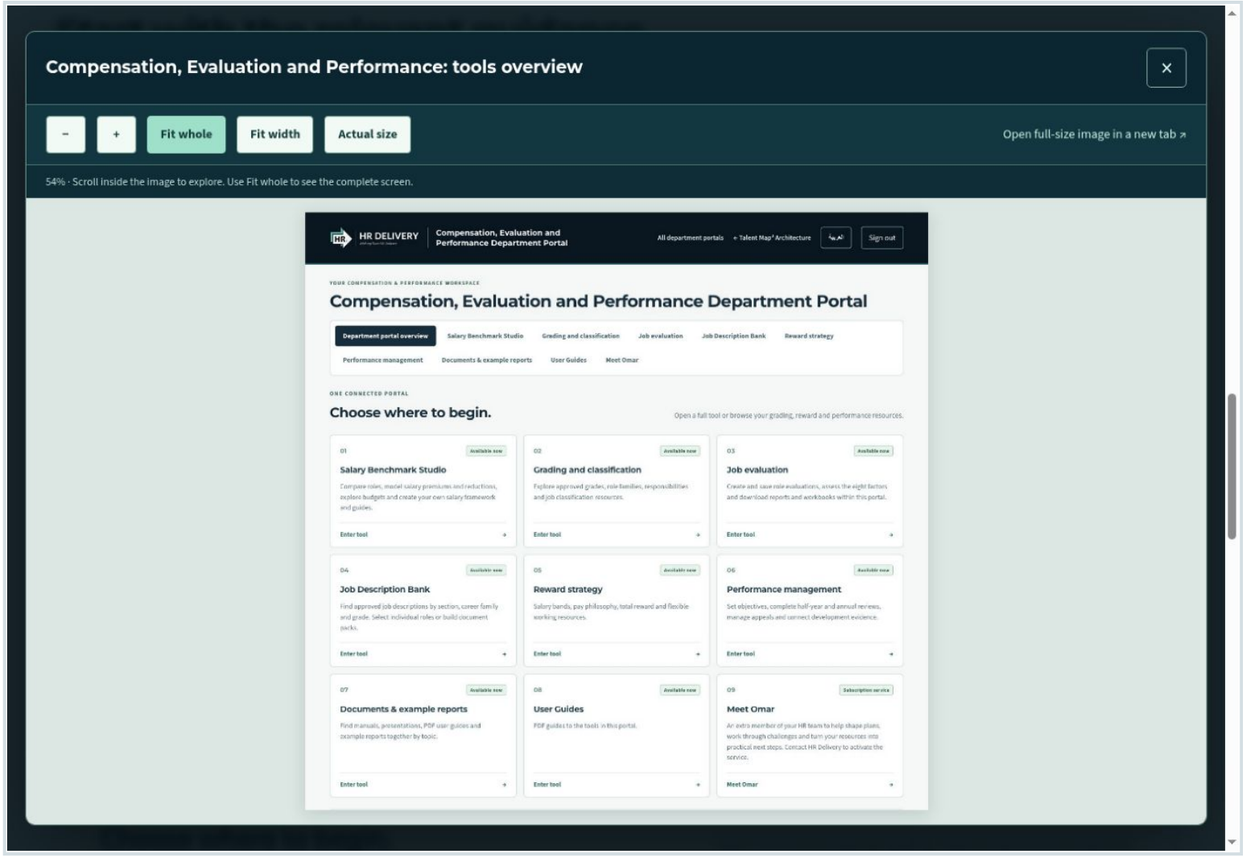
CHECK The record is clear enough for subsequent review.

04 Use the appeal route where appropriate

The portal entry names appeals. Confirm the actual controls, timeframe and independent reviewer with the administrator; record the specific issue and supporting evidence.

CHECK An appeal follows the organisation's stated process.

PUBLISHED DEMONSTRATION



Published Compensation, Evaluation and Performance demonstration; private records and controls were not transaction-tested.

RUN THE PERFORMANCE CYCLE / STEPS 5–5 OF 5

OPEN SOURCE

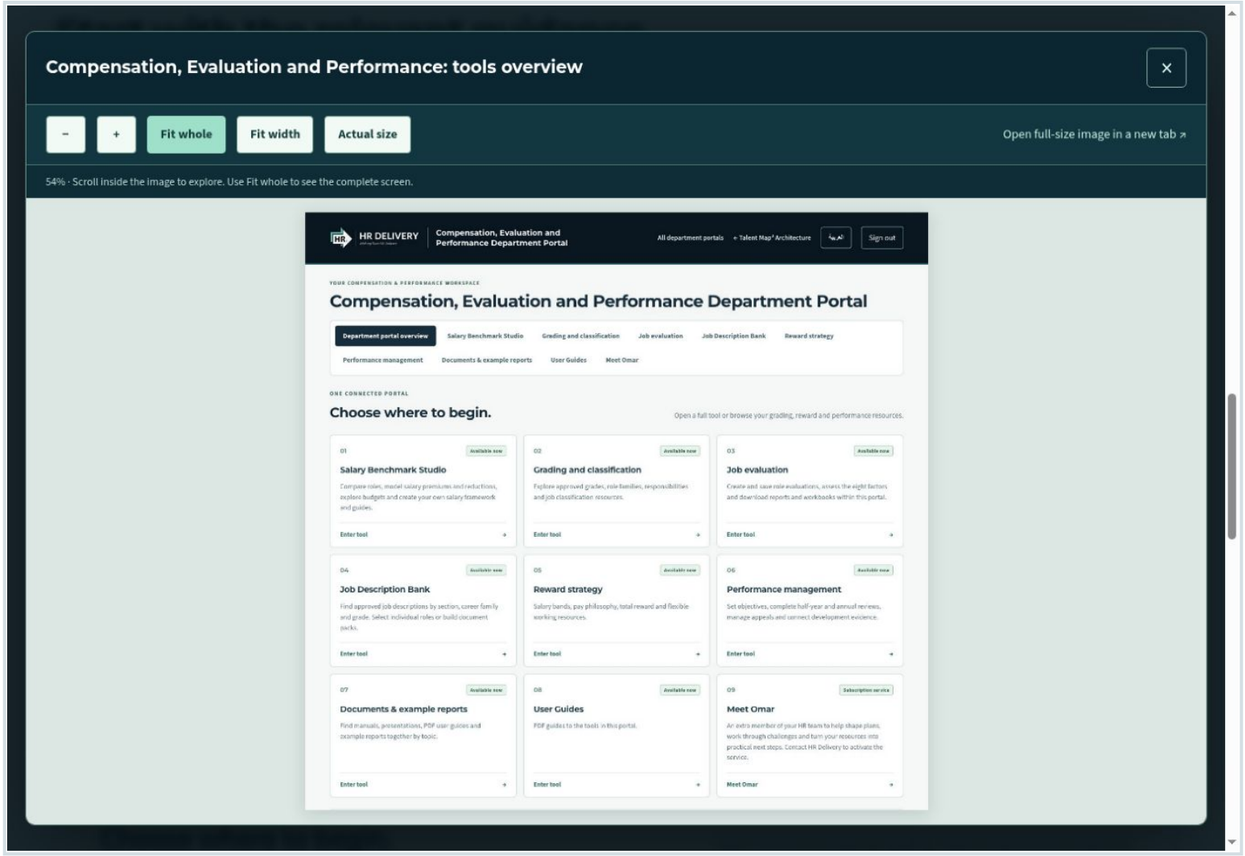
Complete year-end review, rating and appeal

05 Agree the next development cycle

Connect the final review to practical development priorities, next-period objectives and the appropriate report audience.

CHECK The process ends with a constructive next step.

PUBLISHED DEMONSTRATION



Published Compensation, Evaluation and Performance demonstration; private records and controls were not transaction-tested.

06 Resources and specialist support

Use the right guidance for a complex pay or performance question.

01 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

RESOURCES AND SPECIALIST SUPPORT / F-06-01

OPEN SOURCE

Use reward resources and Omar’s specialist route

Prepare a well-scoped request or resource review.

WHO USES THIS HR practitioner or manager

BEFORE YOU BEGIN

- Specific reward/evaluation/performance question
- Country and role context
- Relevant non-sensitive assumptions

WHAT YOU WILL HAVE

- Relevant reward guidance
- Focused specialist-support enquiry

CHECK BEFORE YOU FINISH

- Guidance matches the local purpose
- AI support is correctly understood
- Human decision authority remains explicit

The specialist screen appears but communication is unavailable	Use Lama’s first-contact route to confirm the service arrangement and connection status.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Omar and the resource scope are publicly described; provider-backed delivery was not tested.

RESOURCES AND SPECIALIST SUPPORT / STEPS 1–2 OF 5

OPEN SOURCE

Use reward resources and Omar’s specialist route

01 Locate the relevant resource

Use the department’s reward-reference materials for pay philosophy, total reward, salary bands and performance-process guidance. Select the document that matches the question.

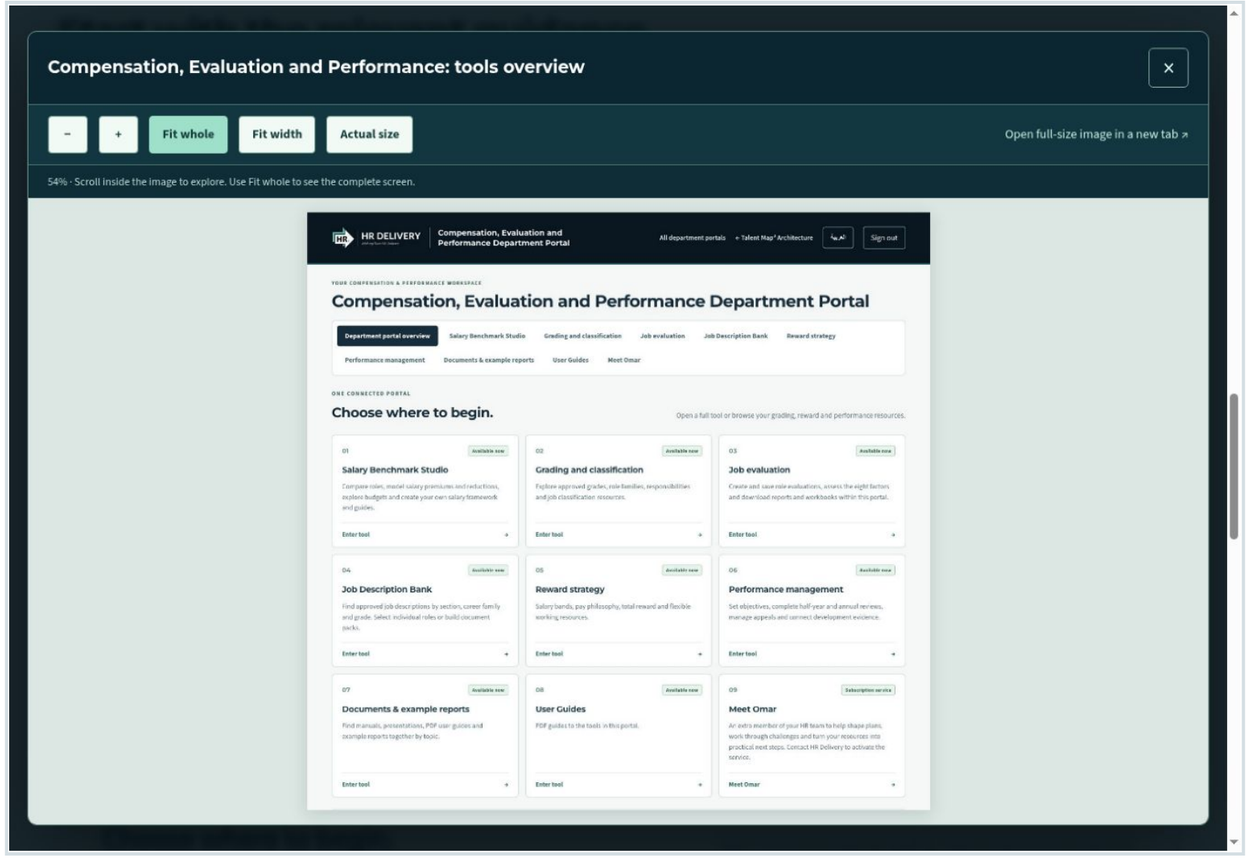
CHECK The resource is relevant to the decision context.

02 Check the document basis

Confirm the edition, audience and relationship to the organisation’s adopted policy. A reference document is a starting point for local review.

CHECK The user understands how the guidance will be applied.

PUBLISHED DEMONSTRATION



Published Compensation, Evaluation and Performance demonstration; private records and controls were not transaction-tested.

RESOURCES AND SPECIALIST SUPPORT / STEPS 3–4 OF 5

OPEN SOURCE

Use reward resources and Omar’s specialist route

03 Prepare the specialist question

State the role, market, pay basis and outcome required. Separate a request for research or drafting from a decision that needs authorised human judgement.

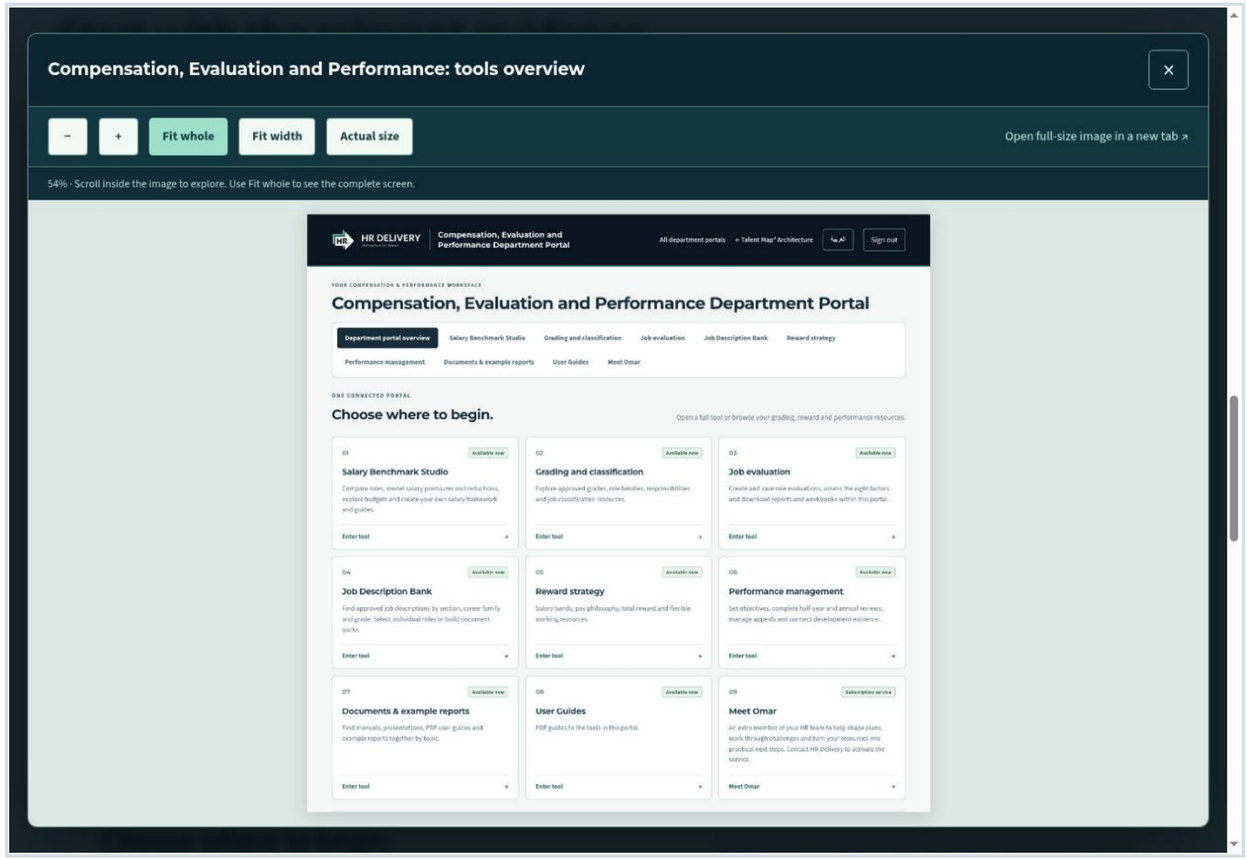
CHECK The enquiry is concrete and answerable.

04 Use the Omar department route

The public department identifies Omar as its fictional AI specialist. Use the current service route and check any communication provider connection before expecting a reply.

CHECK Support is accessed through the service’s stated arrangement.

PUBLISHED DEMONSTRATION



Published Compensation, Evaluation and Performance demonstration; private records and controls were not transaction-tested.

RESOURCES AND SPECIALIST SUPPORT / STEPS 5–5 OF 5

OPEN SOURCE

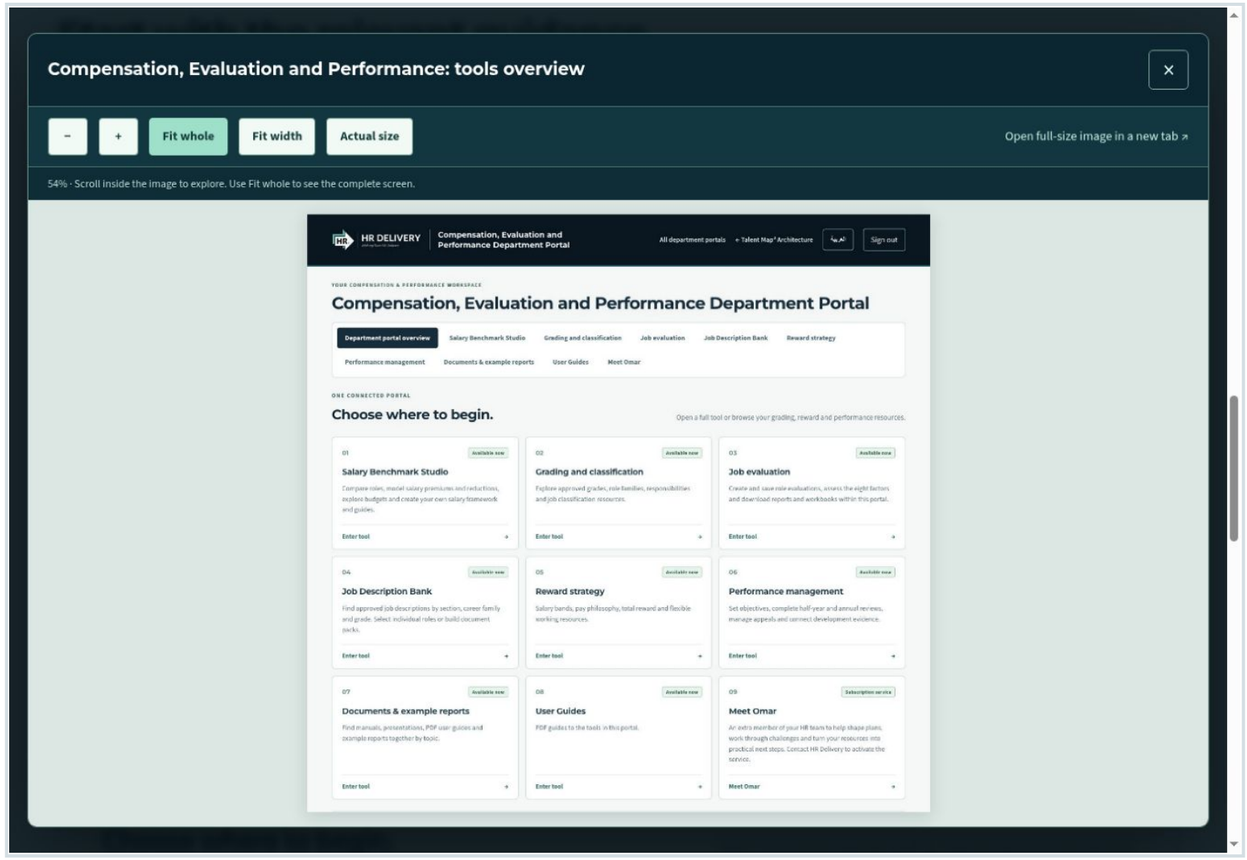
Use reward resources and Omar’s specialist route

05 Start with Lama if access or scope is unclear

Give Lama the exact tool or document title and the issue encountered. Agree an appropriate confidential route before sharing personal compensation or performance records.

CHECK The request can be routed without unnecessary sensitive data.

PUBLISHED DEMONSTRATION



Published Compensation, Evaluation and Performance demonstration; private records and controls were not transaction-tested.

REFERENCE / 1 OF 1

OPEN SOURCE

Eight-factor reference

Factor	Weight	What the evaluator considers
A Applied knowledge	15	Knowledge required to perform the authorised work
B Problem solving	15	Analysis and judgement in normal difficult work
C Decision authority	15	Freedom and authority to make decisions
D Accountability and impact	20	Results owned and their direct consequences
E Scope and stewardship	10	Resources, reach and responsibility for people or expertise
F Stakeholder influence	10	Agreement and influence required
G Risk and sensitivity	5	Formal risk/control responsibility
H Effort and working conditions	10	Normal material demands after controls

REFERENCE / 1 OF 1

OPEN SOURCE

Role-evidence checklist

Reference	Evidence category
E01	Role purpose and accountabilities
E02	Team structure / organisation chart
E03	Decision and spending authority
E04	Service plans / work examples
E05	Budget ownership / financial context
E06	Risk and control responsibilities
E07	Required skills / qualification profile

REFERENCE / 1 OF 1

OPEN SOURCE

Keep these concepts distinct

Concept	Meaning	Do not substitute
Job grade	Evaluated job size	Incumbent performance or desired salary
Salary policy band	Source-based pay reference	A surveyed percentile unless actually supported
Currency equivalent	Indicative expression in another currency	A new market observation
Team benchmark cost	Role/headcount salary scenario	All recruitment or employment costs
Performance rating	Contribution against adopted criteria	Job size or promotion entitlement

REFERENCE / 1 OF 1

OPEN SOURCE

Worked example: check the arithmetic

Item	Illustrative result
Evalu8 degrees A–H	4, 4, 4, 4, 4, 3, 3, 2
Weighted points	60 + 60 + 60 + 80 + 40 + 30 + 15 + 20 = 365
Computed grade	G7; range 340–384; review required
Next-grade distance	20 points; not a target to engineer
Qatar G6 HR Manager monthly basic reference	QAR 21,600 / 27,000 / 32,400
Illustrative conversion	QAR 27,000 ≈ USD 7,417.58 on the displayed rate basis

QUICK REFERENCE

Your final check

- [ ] **01** Match the role, country, grade, pay basis and period before comparing salary values.
- [ ] **02** Keep original bands visible when modelling an adjustment.
- [ ] **03** Evaluate the role using evidence for each factor, not the person’s performance.
- [ ] **04** Separate a computed grade from independent approval.
- [ ] **05** Retain the report edition, review status, assumptions and actual downloaded files.

HELP AND SUPPORT

OPEN SOURCE

Continue with HR Delivery

Start with Lama when you need the correct workspace, an explanation of a tool, a missing resource or help arranging specialist support. Describe the task you were trying to complete and the last screen you reached. Include a redacted screenshot if useful, together with the record reference and relevant date.

OPEN LAMA'S RECEPTION

drphillip@hr.delivery

INCLUDE IN YOUR REQUEST

- Department and workspace name
- Task and last control selected
- Record or document reference, without personal data
- Exact error wording and a redacted screenshot

REFERENCE NOTES

OPEN SOURCE

Guide scope and screen references

- Public screens and examples were inspected read-only. No client records were created, published, sent or approved.
- Screens labelled published demonstration show HR Delivery’s illustrative workspace, not this review’s authenticated access.
- Confirm private form labels, permission rules and save/export behaviour with the workspace administrator before using the source-described procedures operationally.
- Evalu8 is labelled scoring model 0.9 Review and pilot, workbook edition 1.1. The supplied worked example remains under review.
- Public salary values are source-based policy/planning references; midpoint is not a surveyed market median.
- Private salary scenarios, team comparison, saved evaluation, Objectives Generator and performance workflows were not transaction-tested.
- Some Evalu8 controls rendered with limited styling in this browser; the screenshots preserve the actual reviewed interface.

Screen key: Current live screen | Published demonstration | Prior reviewed screen