



One **Council**

HR and Payroll
Performance Plan
User Guide

OneCouncil

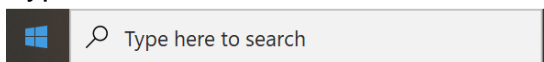
About OneCouncil

One Council is the new all in one Enterprise Resources Platform for Payroll, Finance, Supply Chain, Contracts, Asset Lifecycle Management, Works and Content Management.

Log on by Kwinana Email

Log on from your work computer

- a) Type OneCouncil in the search bar



- b) Double click on the OneCouncil icon



- c) Click on Office 365: for @kwinana.wa.gov.au email accounts

Log on from your own device

- a) Open your web browser
b) Enter URL: <https://kwinana.t1cloud.com/>
c) Click on Office 365 and add your @kwinana.wa.gov.au email account and network password

Log on by Personal Email

- a) Open web browser
b) Enter URL: <https://kwinana.t1cloud.com/>
c) Forgotten Password? Select:
 - to reset your password or
 - First time logging on (password reset is required)
- d) Username: personal email address
e) Password: personal email password

Using this Guide



Notes for extra information.



Tips for handy hints.



Cautions before proceeding.



Online video tutorial reference.

Need extra help?

[Support Page](#)



MENU



Help & Assistance



OneCouncil Support page

Look for the OneCouncil Change Champion sign on their desk.



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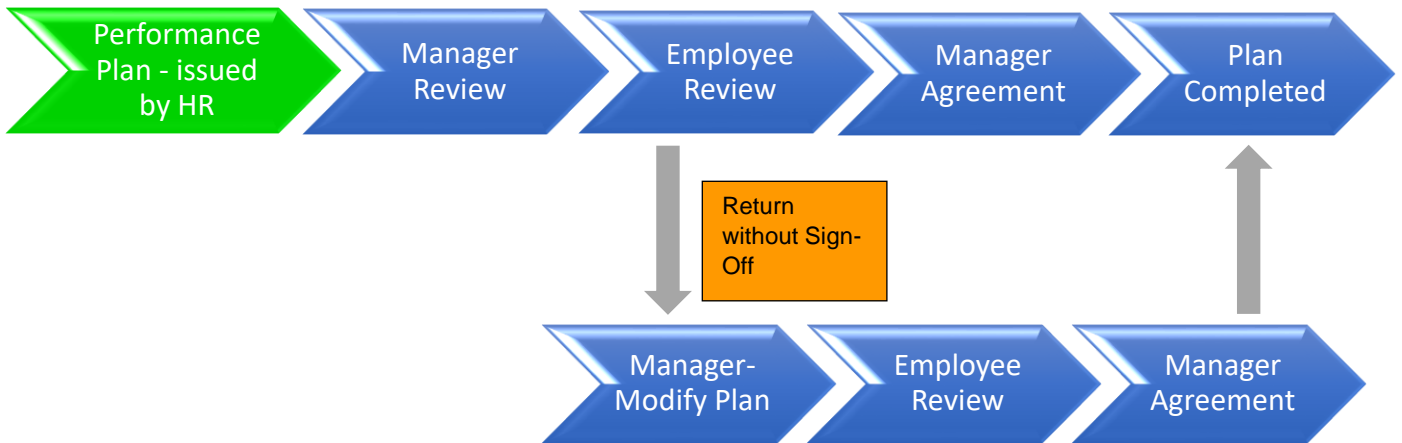
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1.0 The Performance Plan

1.1 Getting Started and Overview

Performance Plans are the function in OneCouncil to record and track progress of your Performance and Development Goals for a 12-month period. The Performance Plan will form the basis of your Staff Development Review.

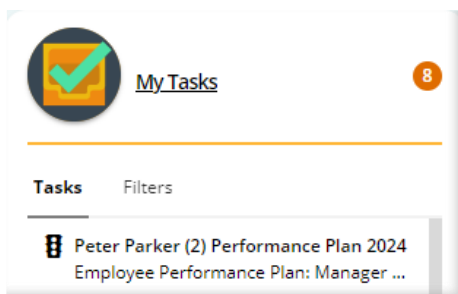
1.2 Process



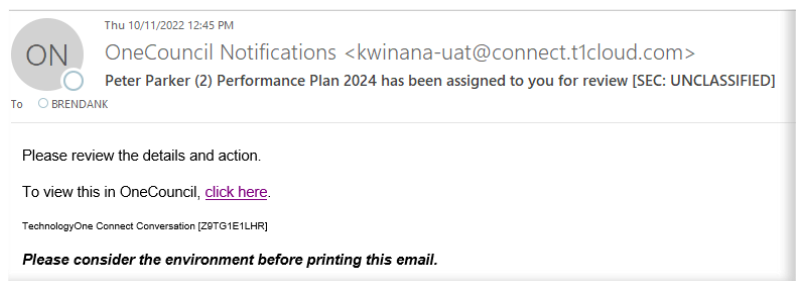
1.3 Notifications

Once HR have loaded the Performance Plans for the year (approx. 14th July), All Managers, Co-Ordinators, Supervisors or Team Leaders who are responsible for actioning Staff Development Reviews will receive an email notification and task to review and complete the Performance Plan.

A notification email and task will be sent each time the performance plan is submitted for review, either by the Manager or Employee.



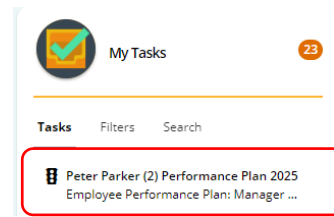
Example task notification



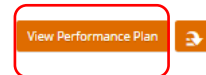
Example of email notification

1.4 Launching the Performance Plan

① Click on the task notification.

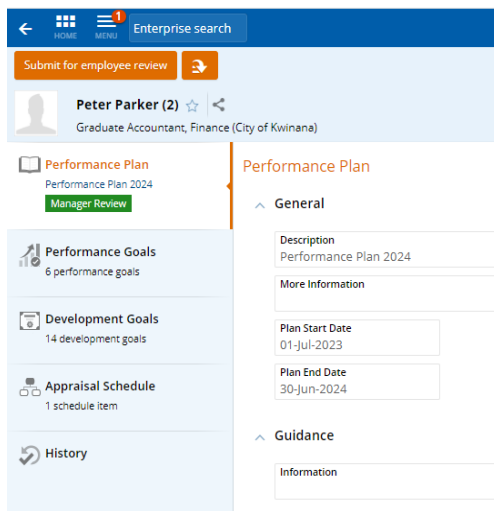


② Select the **View Performance Plan** button to launch the Performance Plan.



2.0 Interface

After launching the Performance Plan, the application displays as follows.



The interface for the Performance Plan consists of:

- **Performance Goals** – What goals the employee will need to achieve in the next 12 months?
 - These can be either Performance Goals (KPIs) that are set on an corporate basis; or
 - Performance Goals (KPIs) that are set for the individual to complete
- **Development Goals** – Training, Conferences, Seminars and long-term Professional Development for periods up to the next five years.
- **Appraisal Schedule** – Lists the date that the annual Staff Development Review will be issued (this will be automatically set). The Staff Development Review will be based on the Goals entered in the Performance Plan that were agreed between the line manager and employee.



The Performance and Development Goals will form the basis of the employees Staff Development Review for the next 12 months.

- **Functions and Action Menu's**

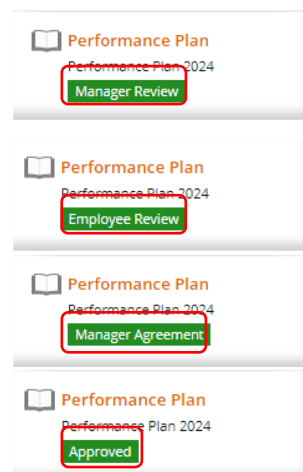
Depending on the stage the Performance Plan, different functional buttons will display. Such as:

- **Submit for Employee Review** - Manager will use this function to progress the Performance Plan to the next stage – Employee Review.
- **Edit** – To prompt a dialog box or change the response.
- **ADD** – To add an additional Goal if more than 4 are required.
- **Sign off** – Employee will use this function to sign off the Probation and return to the Manager.
- **Return Without Sign-Off** – Employee can return Probation without signing and will have the opportunity to add a comment before returning, prompting a conversation to be had with their manager.
- **Change Assessment** – The manager can select this when the assessment requires changing. This will return the probation to the Employee for Sign-Off once more.
- **Answer** – Manager will choose this function to prompt an answer dialog box for the Probation questions.
- **Cancel** – Cancel the probation.
- **Save** – to save the response
- **Save & Next** – Save the response and moves to the next question.
- **Add** – to add to the selection.
- **Details** – Details of the Answer provided

2.1 Status

Status – The status in Green will Determine what stage the workflow is throughout Performance Plan:

- Manager Review
- Employee Review / Sign-Off
- Manager Agreement / Sign-Off
- Approved Plan / Completed

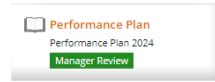


3.0 Manager Review – Completing the Performance Plan

3.1 Status

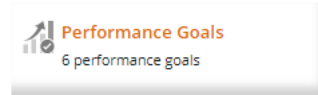
① After launching the Performance Plan, you will notice there is a Green notification with the following status, depending on what stage the performance plan is at:

- Manager Review




3.2 Performance Goals


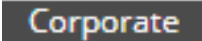
① Navigate to the Performance Goals section

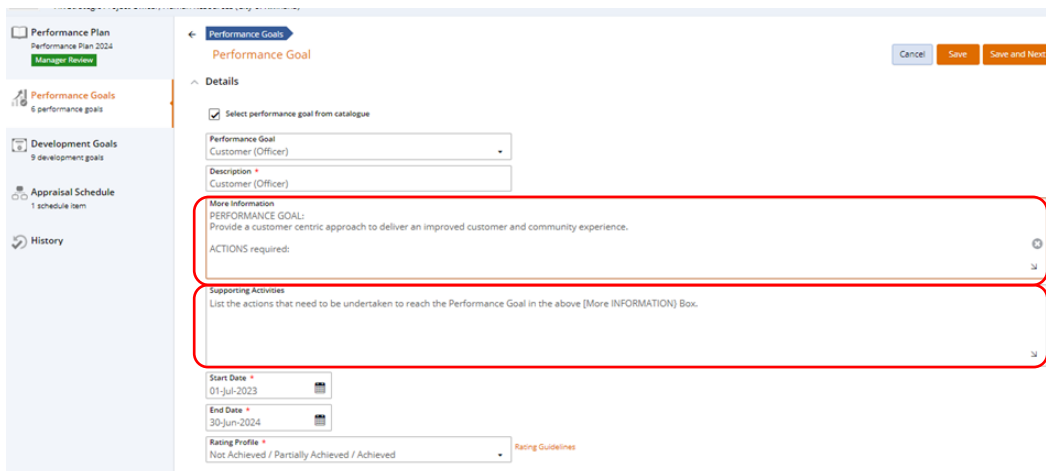


Note: These goals will automatically form the Performance Goals for the employees annual Staff Development Review in the following year.

 There will be Performance Goals which will have **Corporate** tags. These Goals are set by the City and will not require editing, unless you wish to add actions/measures that need to be undertaken to reach the Goal (this is needed for Officer level employees)


CORPORATE PERFORMANCE GOALS

- ② Select  on each of the Goals that are listed 'Corporate' 
- **Do not untick** the 'select performance goal from catalogue' box
 - The 'Description' will list the type of 'Corporate Goal' and its level (whether it is Director, Manager, Coordinator/Team Leader/Supervisor or Officer) – Leave this as is
 - **Refer** to the supporting activities as these are instructions that will assist you in completing the Performance Goal.
 - **Add** in the actions that need to be undertaken by the employee in the 'More Information' text box under "ACTIONS required:"
 - These actions that are inserted may also include any measures that are used to determine how the Performance Goal was met.

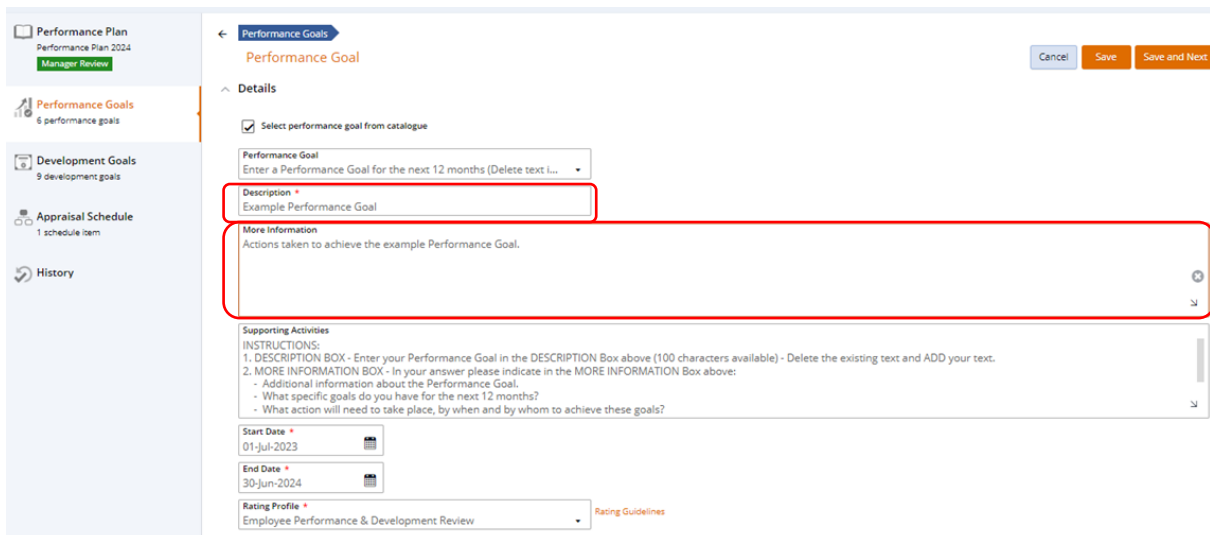


Please do NOT adjust the Goal's '**Start Date**', '**End Date**' (unless needed for a specific project) or '**Rating Profile**' if you are able to view these data fields. These are currently unable to be removed from the user interface.

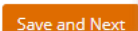
INDIVIDUAL PERFORMANCE GOALS

- ③ Select  on each Goal which does not have the 'Corporate' tag listed – these are individual goals that are created between the employee and line manager
- This will open the Goal for editing.
 - **Do not untick** the 'select performance goal from catalogue' box
 - **Do not delete the text** in the field labelled 'Performance Goal'
 - **Refer** to the instructions in the 'Supporting Activities' box.
 - **Provide** a brief summary of the individual performance goal in the 'Description' box (a maximum of 100 characters)
 - **List** the information in the 'More Information' box related to the employee achieving their individual performance goal. This may include:
 - Breaking down the individual goal into smaller specific goals for the next 12 months?
 - What action/s will need to take place, by when and by whom to achieve these goals?
 - What is the specific goal Priority and Due Date?

Please do NOT adjust the Goal's '**Start Date**', '**End Date**' (unless needed for a specific project) or '**Rating Profile**' if you are able to view these data fields. These are currently unable to be removed from the user interface.



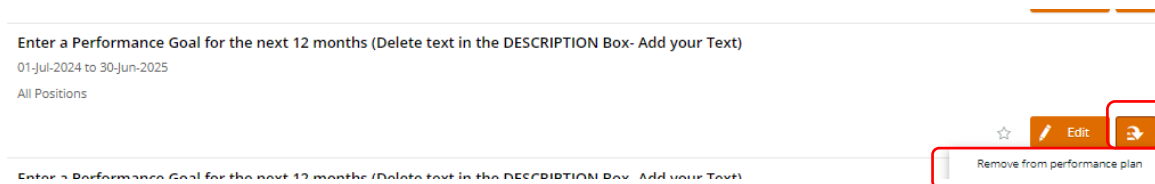
- ④ Click **SAVE and Next** to progress through the next performance goals.




⑤ Removing Performance Goals from the Plan

- If you do not require all four Goals, please remove from performance plan.
If you are in the 'Edit' screen you will need to return to the summary screen to remove. Click 'Cancel' to return to the summary screen.

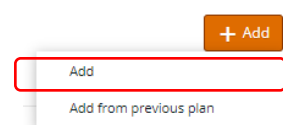
- In the summary screen, Click on the action menu against the Performance Goal that you want to remove and select **Remove from Performance Plan**.



 Remove the Goals / Questions which are not relevant to the employee that you do not wish to utilise.

⑥ Adding additional Goals

- If there are more than 4 Goals required, the manager can add Goals to the Performance Plan.
- Click on **ADD**
- **Ensure** “Select performance goal from catalogue” is UNTICKED.
- **Enter** the Performance Goal Description in the ‘**Description**’ **Box**.
- **Enter** additional information in the ‘**More Information**’ **Box**.
 - What is the specific Goal?
 - What action will need to take place, by whom to achieve the goal?
 - What is the priority and due date of goal?
- **Do not list** any Supporting Activities.
- Select **Save**.



Performance Goal Cancel Save Save and Next

^ Details

Select performance goal from catalogue

Description *
<Describe what is to be achieved and how progress will be measure...>

More information
<Describe how this goal will be achieved and any other additional information about the goal.>

Supporting Activities
<Describe the activities to be performed by you and others which will enable the goal to be achieved.>

3.3 Development Goals

- ① Navigate to the Development Goals section of the Action menu.



Development Goals are either:

- 'Corporate' Development Goals that is training that is provided to City employees, depending on their role, as part of a whole organisation strategy or requirement.
- Individual Development Goals which are any development areas or training requirements that are identified by the Manager or employee and are specific to their work/team.
- Conferences and/or seminars relevant to the employee's work that could be attended.
- Training and development opportunities that are identified in the years ahead.

Please keep in mind these goals will automatically form the Development Goals for the employees annual Staff Development Review.



There will be a Development Goal which will have a **Corporate** tag. This Goal is set by the City and will not require editing

CORPORATE DEVELOPMENT GOALS

- ② **Review** the Development Goal that is listed as **Corporate**. As per the instructions in the 'Supporting Activities' box, no further action is required.

INDIVIDUAL DEVELOPMENT GOALS

- ③ Select **Edit** on each Goal. This will open the Goal for editing.
 - **Do not untick** the 'select performance goal from catalogue' box
 - **Refer** to the instructions in the 'Supporting Activities' box.
 - **Enter** a description of the individual Development Goal in the 'Description' box (maximum of 100 characters).
 - **Follow** the instructions in the 'Supporting Activities' box and insert in the 'More Information' box all relevant information which may include:
 - The need for the Development / Training
 - Training objective or reason for the Training/Development
 - The best way to achieve the training objectives
 - The importance of the Development / Training need
 - Click **Save and Next** to move to the next goal.

Please do NOT adjust the Goal's '**Start Date**', '**End Date**' (unless needed for a specific project), '**Rating Profile**' or '**Objective type**'. These are currently unable to be removed from the user interface.

← Development Goals

Development Goal Cancel Save Save and Next

^ Details

Select development goal from catalogue

Development Goal
Enter a Development Area/Training Need here. (Delete text in ...)

Description *
Enter a Development Area/Training Need here. (Delete text in DESC...)

More Information

Supporting Activities
INSTRUCTIONS:
1. List a short summary of the Development Area/ Training Need in the DESCRIPTION BOX above (100 characters available). DELETE the existing text and ADD your text.
2. In your answer please indicate in the [MORE INFORMATION] box:
- What is the Development Area/ Training need?
- What is the training objective / reason for the Training/Development?
These could include: (Note, can select more than one)

Start Date *
01-Jul-2024

End Date *
30-Jun-2025

Rating Profile *
Development Goals Rating Guidelines

Objective Type



Remove any Development Goals which are not relevant to the employee or you do not wish to utilise.

④ Removing Development Goals from the Performance Plan

- If you do not require all goals, please remove from the Performance Plan.
- Click on the action menu against the Development Goal you want to remove and click **Remove from performance plan**.

Enter a Development Area/Training Need here. (Delete text in DESCRIPTION BOX - Add your Text)

01-Jul-2024 to 30-Jun-2025

All Positions | Training

☆ Edit ↻

Remove from performance plan

Move up

Move down

☆ Edit ↻

Enter a Development Area/Training Need here. (Delete text in DESCRIPTION BOX - Add your Text)

01-Jul-2024 to 30-Jun-2025

All Positions | Training

⑤ Adding additional Goals to the Performance Plan

- If there are more Goals required, the manager can add Development Goals to the Performance Plan.
- Click on **Add**
- **Untick** – “Select development goal from catalogue”.
- Enter a description of the Performance Goal in the ‘Description Box’.
- Enter additional information in the ‘More Information’ Box such as:
 - What is the specific Goal?

+ Add

- What action will need to take place, by whom to achieve the goal?
- What is the priority and due date of goal?
- **Do not list** any Supporting Activities.
- Select **Save**

The screenshot shows a 'Development Goal' form. On the left is a navigation menu with 'Performance Plan', 'Performance Goals', 'Development Goals', 'Appraisal Schedule', and 'History'. The main form has a 'Details' section with a 'Select development goal from catalogue' checkbox. Below that is a 'Description' field with a placeholder text: '<Describe what is to be achieved and how progress will be measure...'. This is followed by a 'More Information' field with a placeholder: '<Describe how this goal will be achieved and any other additional information about the goal.>'. Below these is a 'Supporting Activities' field with a placeholder: '<Describe the activities to be performed by you and others which will enable the goal to be achieved.>'. At the bottom are 'Start Date' (01-Jul-2023), 'End Date' (30-Jun-2024), and 'Rating Profile' (Development Goals) with a 'Rating Guidelines' link.

- ⑥ Once the manager has entered all the goals applicable to the employee in the Performance Plan, click **“Submit for employee review”** and the Performance Plan will then be sent to the employee for review and sign off.

Submit for employee review

4.0 Employee Review

4.1 Employee Review

- ① Follow the Task or Email Notification and click on **view Performance Plan**.
- After launching the Performance Plan, you will notice there is a green notification with the following status, depending on what stage the performance plan is currently at.

View Performance Plan

Performance Plan
Performance Plan 2024
Employee Review

Note: the electronic document that is being generated which can be viewed to the right of the screen displays the Goals for the employee.

The screenshot shows a 'Performance Plan 2024' document. At the top, it says 'EMPLOYEE REVIEW' and '01-Jul-2023 to 30-Jun-2024'. Below that is the employee's name 'Peter Parker', '2 | Reference ID: 2', and 'Graduate Accountant (City of Iviviana)'. The document lists 'Performance Goals' for 'Customer' and 'Operational Training - EEO Training'. It also lists 'Development Goals' for 'Operational Training - EEO Training' and 'Operational Training - Cultural Awareness & Understanding (Kamberangi)'. The document is partially obscured by a notification banner at the top right.

② Navigate to the Performance Goals and review.

- Select **View** to open the Goal and review.

List a specific Goal for this performance period (12 months)
01-Jul-2024 to 30-Jun-2025
All Positions

Rolled Forward From Previous Plan



③ Navigate to the Development Goals and review.

- Select **View** to open the Goal and review.

Organisational Training - Snake Awareness Training

01-Jul-2024 to 30-Jun-2025

Officers

Snake Awareness Training

- Knowledge of snake species.

- Knowledge in First Aid.

- Knowledge of applicable handling.

Corporate Rolled Forward From Previous Plan



④ If the Performance Plan is agreed to by the employee:

- Select **Agreed**.
- This will send the Performance Plan back to the manager for completion.



4.2 Employee Review: Returning Plan to Manager without Agreement

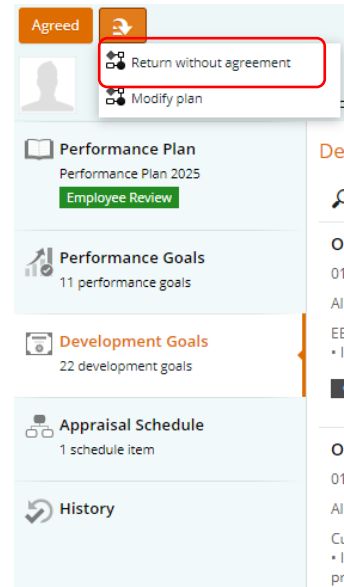
① **Return without agreement.**

If the employee feels the Performance Plan requires modifying:

- Select **“Return without agreement”** from the Action Menu.
- A **comments box** will appear for the employee to enter a reason which will prompt a conversation with a comment for the manager to modify any details which require changing.

Return without agreement

Comments

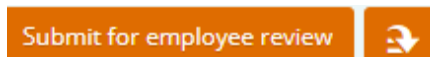


- The Performance Plan will then automatically be sent back to the manager for their review.

Note: The employee also has the ability to modify the Performance Plan and individual Goals themselves. If this occurs, the employee will also be prompted to insert a comment outlining changes prior to submitting back to the manager for their review and approval. However, ensure all changes are discussed with the manager prior to sending it back.

② The Manager will discuss the changes with the employee and **modify** the Plan if applicable.

- Launch the Performance Plan from the email notification or task.
- Select **View Performance Plan**.
- Select **Edit** to modify Goals.
- Modify details of the Goal and **Save**.
- Select **Submit for employee review**.



- The Performance Plan will be sent back to the employee for review and Sign-Off.

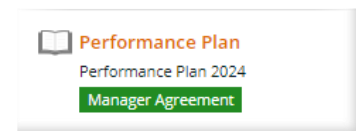
③ When the Performance Plan is agreed to:

- Select **Agreed**.
- This will send the Performance Plan back to the manager for completion.



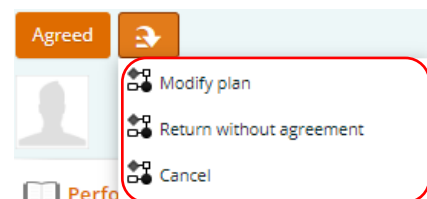
5.0 Manager Agreement

① After launching the Performance Plan, you will notice there is a Green notification with the following status, depending on what stage the performance plan is at:

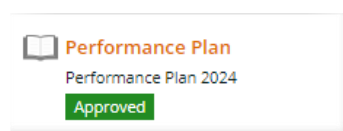


② Review the Performance Plan and from the Action menu, choose either:

- **Agree** – will complete the Performance Plan
- **Modify Plan** – To make any changes. Plan will then revert back to Manager review, changes can be made to the plan and submitted to the **Employee for review** again.
- **Return without agreement** – Return to employee and another conversation will need to take place to agree on the Performance Plan



③ Once all changes have been agreed to, select **Agreed** - the agreed Plan will now have a status of Approved.



6.0 Performance Plan in Operation Throughout the Review Period

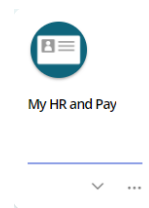
The Performance Plan can be accessed during the year by either the:

- Employee, to update any progress on Goals; or
- The line manager, to review the employee's progress of Goals and/or update their own progress.

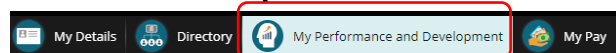
Note: These steps apply to both the 'Performance' and 'Development' Goals

6.1 Employee's updating their Goal's progress or viewing their goals.

- ① Navigate to **My HR & Pay** in OneCouncil.

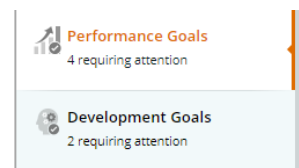


- ② Select **My Performance and Development**.

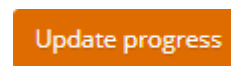


- ③ This will open the Performance Plan.

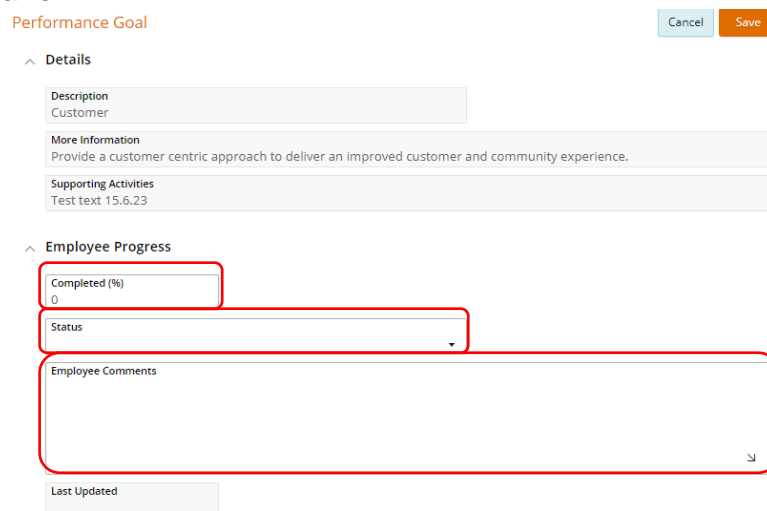
- The employee can update each Goal's progress from this screen by navigating to **Performance Goals** or **Development Goals**.



- Select **Update progress** on the specific Goal to update it.



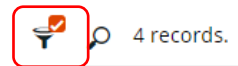
- Insert a **completed percentage** of the Goal
- Select from the drop-down menu to indicate the **'Status'** of the Goal
- Insert a **comment** on the Goal's progress
- Select **Save**



- ④ **Update** each Goal as needed.
- ⑤ Each update that occurs to each Goal will be labelled as **UNCONFIRMED** until the line manager has had an opportunity to review the update and confirm its progress.

*Note: If you are unable to view 'Completed Goals', try using the **filter** and alter the viewing options as needed.*

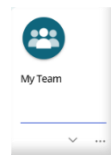
Performance Goals



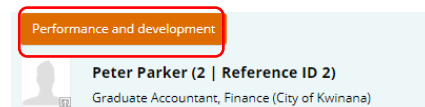
6.2 Manager confirming the completion of Goals or reviewing their progress.

An employee does not necessarily need to update or complete a Goal in order for it to be reviewed by a line manager. The progress of the Goal, or whether a Goal has been completed, can be reviewed at any time during the review period.

- ① Navigate to **My Team** in OneCouncil
 - Select the **Employee** and then **View**.



- Select **Performance and Development**.



- ② Select **'Performance Goals'** from the action menu and click on **Update progress** on the Goal you wish to review.
 - Reflect on the Goal progress or completion.
 - **Review** the employee's comments.
 - Confirm progress if needed by ticking the box titled **'Employee's progress confirmed'**.
 - Insert commentary on the Goal's progress or completion.

Note: The City of Kwinana are only utilising the 'Performance' and 'Development Goals' in this OneCouncil Module. Items in the Action menu of the Performance Plan such as the '360 reviews', 'Conversations About Me' or 'Competencies' are not currently being used.

- ③ A 'Confirmed' and 'Completed' Goal will look like this.

Customer
01-Jul-2022 to 30-Jun-2023
Planned | Officers | Customer
Provide a customer centric approach to deliver an improved customer and community experience.
Corporate

COMPLETED
CONFIRMED

Update progress

6.0 FAQs

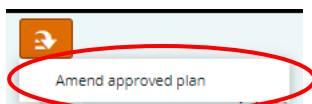
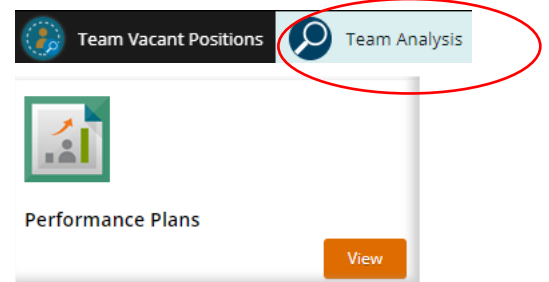
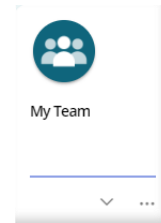


The manager can initiate an amendment of the approved Performance Plan only if the Staff Development Review (SDR) has not been issued yet.

How to Amend an Approved Performance Plan or get access to a Performance Plan.

- ① Navigate to My Team

- Select My Team
- Select the **Team Analysis** TAB on the top Function Bar.
- Select **Performance Plans - View**
- Select the **employee and View.**
- Click on the Action Menu
- Select **Amend approved Plan.**



- ② Amend Performance Plan:

- The Performance Plan may need to be amended due to the employee
 - Transferring to a new position
 - A change in the existing Plan
- Select **Existing Position** or **New Position** from the drop down.
- **Enter** a reason
- Select **Amend approved plan.**

Amendment

Amendment Type *
Existing Position

Existing Position

New Position

Amend approved plan

- ③ The employees Performance Plan will open

- Select either Performance Goals or Development Goals.
- Select the Goal to be amended and click **Edit.**

- Make the required changes.
- Select Save.
- The process will be the same as creating the Performance Plan
- Submit for **Employee review**, Plan will be sent to the Employee.
- Employee will **Agree**, Plan will be sent back to Manager,
- Manager will review and **Agree**, Plan will be completed.