How to finalise a CR&D for a member of your team – guide for Managers

This short guide will show you how to finalise a CR&D for a member of your team. Please note that you can only sign off a CR&D after your team member has signed off their part.

Log into CoreHR and then select the Manager Dashboard option.



Once the manager dashboard appears, click on the **CR&D** icon on the left hand side.

\equiv Manager Dashboard	Sourch Dashboards or Widgets
CT Co Trainer	Book A Course SEARCH ACTIONS - My Team's CR&D VIEW ALL
Manager Dashboard	Enter Keyword
💎 Dashboard	
Dnline Forms	In Progress (3)
Analytics Additional Options	
CR&D & Training	

You will then see a box called **My Team's CR&D**. Click on **View All**. You will then see your team's CR&Ds listed. Please note that each section of the CR&D is listed individually for each person. If an individual has more than one contract, these will be listed individually as well.

Click on the 3 dots against **Objectives and Progress Review 2019-20** against an individual and then select **Launch**.

Manager Dashboard					
My Team Appraisals Manager Dashboard > My Team Appraisals					
Direct Appraisals	Indirect Appraisals	Calibration			
Search by review name Q	All CR&Ds	-			
ST Star Trainer Department Revenue And Benefits	Appointment 544-7 Job title Accord Card Manager	Development Plan 2019-20	Development Plan Awaiting Manager Action	01-Mar-2020 Stage Due Date	
ST Star Trainer Department Revenue And Benefits	Appointment 544-7 Job title Accord Card Manager	Objectives and progress review 2019-20	Stage 1 Awaiting Manager Action	01-Mar-2020 Stage Due Date	:
ST Star Trainer Department Revenue And Benefits	Appointment 544-7 Job title Accord Card Manager	Knowledge,Skills & Behaviours- (Capability Fra	Capability Framework Awaiting Employee Action	01-Mar-2021 Stage Due Date	:

Click on the **Review Overall Progress** tab on the left hand side.

← Employee Dashboard		
Step 1 - Objectives And Progress Rev Employee Dashboard > Step 1 - Objectives And Progre	view 2020/21 (Star Trainer - 544-7) ss Review 2020/21 _	
OBJECTIVES AND PROGRESS REVIEW ST	Review Overall Progress	
Add Your Objectives Here	This section is for keeping a summary of ongoing progress - it should be kept up to date, particularly	before 1:1 meetings.
Review Overall Progress	The first question is for employees to give a self rating, the second question is an agreed rating by bo	th parties which the manager inputs and the third question only to be completed by the manager if the answer to question 2 is 'Not achieving' or 'Developing'.
Increment Entitlement	1. Overall Rating - self rating	
Sign Off	Please put in your overall objective rating	
	Star Trainer	Co Trainer
	Enter a Rating * Successfully Achieving -	This section is for Employee only
	Additional comments	
	2. Confirmed Rating	
	This section is to capture the confirmed overall rating as agreed by both parties.	
	Star Trainer	Co Trainer
	This section is for Manager only	This section will be visible after the Manager agris off this stage
		corehr .
1		Reset Strange

Make sure that this section is fully complete and ratings are input. The **Review Overall Progress** section allows you to add an **Overall Rating** for all employee's objectives. The first question is answered by employee, the second question is completed by yourself to confirm the agreed rating once you have had a conversation with the individual.

Increment Entitlement

The **Increment Entitlement** section requires the Manager to confirm whether an employee is subject to either Managing Performance or Managing Discipline Policies. The Manager should enter the response before clicking save. Please note you will not be able to complete Sign Off until this has been entered.

STEP 1 - Objectives and Progress R Manager Dashboard > My Team Appressals > STO	Neview 2020/21 (Star Trainer - 544-7) P1 - Objectives and Progress Review 2020/21 .		
OBLICTIVES AND PRODUCES REVEW ST. Add Your Objectives Here Review Overall Progress Incomment Entitlement Sign Off	Increment Entitlement This section is to be completed by the manager. Employees will receive an increment where eligible unless they 1. Employee Increment Is the individual currently subject to either of the for 1) Reached stage 1 of the Managing Performance I 2) Been issued a first level warning or higher discip	are subject to one of the policies below lowing policies ? folicy inary sanction under the Managing Discipline Policy	
	Star Trainer The sector is for Manager only	Co Trainer Errer = Starry * Automaticomments You have not responded to this guest	Select yes or no from the drop down here then click Save
			SAVE

The final step	is to Sign	Off. Click	on Sign Off	and then the Sig	n Off button.
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Employee Dashboard					
tep 1 - Objectives And Progress	Review 2020/21 (Star Trainer - 5- gress Review 2020/21 _	44-7)			
OBJECTIVES AND PROGRESS REVIEW ST	Sign Off				
Add Your Objectives Here	Sign Off			\backslash	
Review Overall Progress	Star Trainer	Co Trainer		\backslash	
Increment Entitlement	Requires password authentication	Pending Employee signing off		\backslash	
Sign Off					
	Date	Action	By	\backslash	
	01-Jul-2020 13:22	HR Admin returned to employee			
	30-Jun-2020 12:05	Signed off	Star Trainer	\backslash	
					2
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You will see a box that asks you for a password. Input this and click on **OK**.

Confirm Passv	vord	
Password *		0
This field is required		
	CANCEL	ОК