

# PERFORMANCE REVIEWS

11.07.2024

# AGENDA

- Review profiles
- Best practices for reviews
- Performance Reviews report
- Troubleshooting
  - Demo in Elements



# REVIEW PROFILES

- Review profiles can be set to auto-assign upon hire – this would only be done if you have one review profile.
- If a review profile is not auto-assigned or assigned in the hire wizard, you can assign it from within the employee's profile > profiles section > Performance Review
- Once the profile is assigned to the employee, their first review will be auto-generated based on the settings in the profile's configuration.
  - Please note that some configurations require additional steps be completed before assigning the review profile



# BEST PRACTICES

- APS' recommended best practices for performance reviews
  - Know your process
    - The system simply replaces the need for paper reviews; it will not take the place of any person or process that currently exists – it only simplifies it and keeps it all in one place online
  - Simplicity
    - Keep your process simple (keep the workflow simple).
    - The more individuals that are involved in the reviews, the more complicated it gets, and the more likely the review is to not get completed.
  - Predictability
    - We've found that clients who have performance reviews for all employees at the same time each year (1/1, 7/1, etc) are more successful in completing them on time than those who do reviews on employee anniversary dates



# REVIEW WORKFLOWS

- Common Review Workflows
  - Employee > Manager > HR > Employee Signs > Manager Signs > HR Finalizes
  - Manager > Employee > Manager Signs > Employee Signs > HR Finalizes
- Having executives or individuals that do not login to the system much, or having too many individuals be involved in the review process does not tend to produce a high success rate.



# PERFORMANCE REVIEWS REPORT

- Menu > Team Tab > Talent > Performance > Performance Reviews
- Think of this report like a "performance review hub"
  - See scheduled, in progress, and finalized reviews
    - It is best to save multiple versions of this report to show only scheduled reviews, only in-progress reviews, and even only finalized reviews.
  - View status/workflow for an in-progress review
  - Add/edit/delete/manually initiate reviews
  - Cannot finalize a review from this report, nor can you complete your portion of a review. Those tasks need to be completed from the to-do item in your bell icon.



# TROUBLESHOOTING

- Issue #1 - Employee or manager says they can't find a review or do not have it.
- Issue #2 - Employee or manager says that when they go to the Entry tab, they cannot enter comments or ratings.
- Issue #3 - Last year's review did not get finalized, so this year's review was not generated.



# ISSUE #1

- **Employee or manager says they can't find a review or do not have it.**
  - Look at their screen with them or use the shadow session to login as the employee/manager to verify that they don't have a to-do item
  - If they don't have the to-do item, go to the performance reviews report, find their review, and click the 'view workflow' button.
    - Blue means the step is complete.
    - Gray means the step is incomplete.
    - The step in gray immediately following the last blue step is the step that the review is currently on.





# Workflow



Completed steps

Current step


Incomplete steps




# ISSUE #2

- **Employee or manager says that when they go to the Entry tab, they cannot enter comments or ratings.**
  - Remind them that from the to-do item, they need to click the 'Review' button in the bottom right corner, not the 'View Performance Review'.

**Review Performance Review**

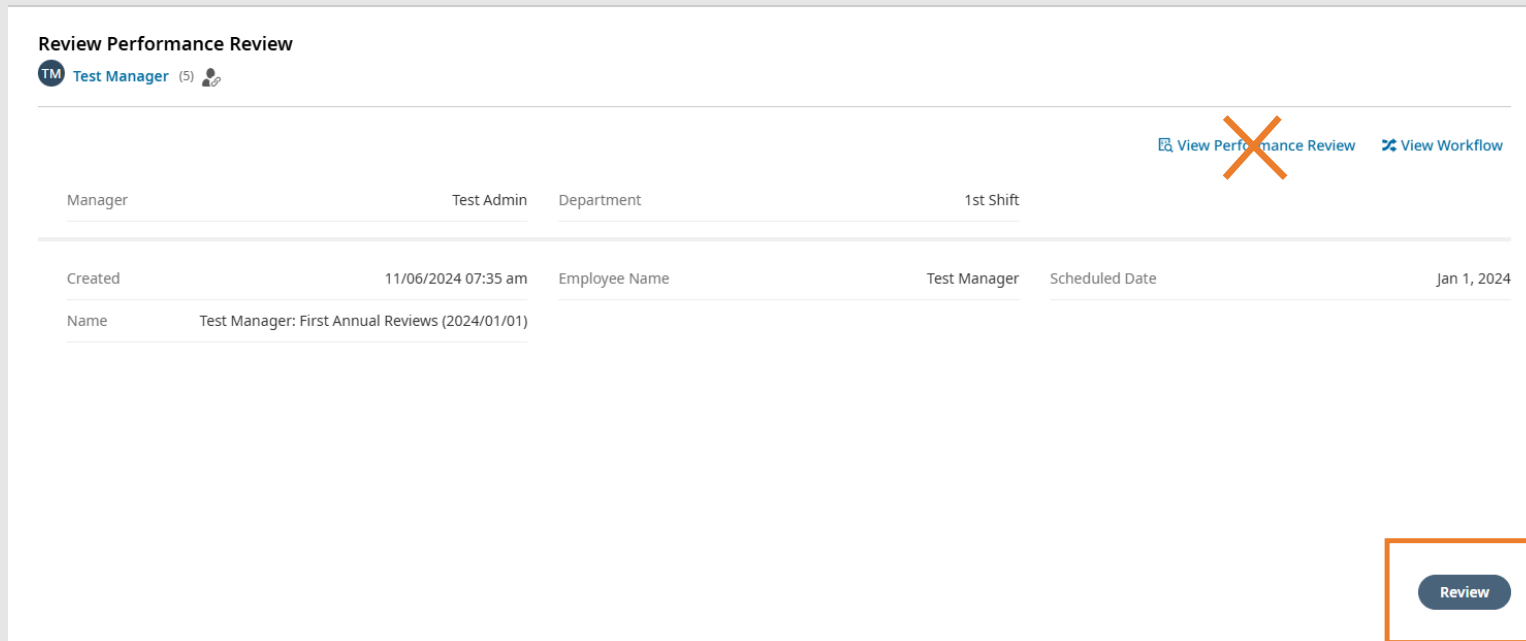
TM Test Manager (5) 

[View Performance Review](#)  [View Workflow](#)

Manager	Test Admin	Department	1st Shift
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Created	11/06/2024 07:35 am	Employee Name	Test Manager	Scheduled Date	Jan 1, 2024
Name	Test Manager: First Annual Reviews (2024/01/01)				

[Review](#)



## ISSUE #3

- **Last year's review did not get finalized, so this year's review was not generated.**
  - Go to the performance reviews report and find the employee's previous review that did not get finalized.
  - View the workflow
    - If it is on the finalize step, you can mass finalize reviews from the 'Reviews to Finalize' report (menu > team tab > talent > performance > reviews to finalize). Finalizing this review will auto-generate the next one.
    - If it is not on the finalize step, it will either need to be finished or deleted to move on to the next review. Deleting the review will delete all associated data within that review.
      - If the review is deleted, you will need to manually generate the next one.
  - Once the next review is generated, you will need to manually initiate it.

