

Performance Management Review Cycle Guide

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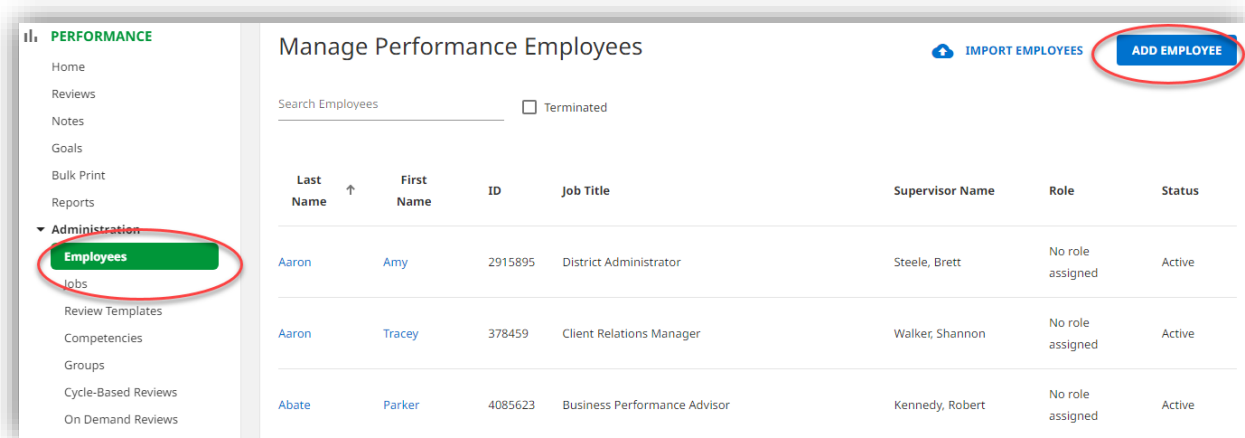
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Employees and their jobs

How do I add employees to the system and grant them access?

Employees are automatically added to Performance Management and granted basic access through Premier integration. If you do not have integration turned on at your company or have any non-Insperity paid employees and need to manually enter employees into the system, follow the instructions below:

Go to the **Administration - Employees** menu item.
Click on the **Add Employee** button.



Last Name	First Name	ID	Job Title	Supervisor Name	Role	Status
Aaron	Amy	2915895	District Administrator	Steele, Brett	No role assigned	Active
Aaron	Tracey	378459	Client Relations Manager	Walker, Shannon	No role assigned	Active
Abate	Parker	4085623	Business Performance Advisor	Kennedy, Robert	No role assigned	Active

Enter specific information for the employee.

Employee Information

Enter the following information.

- **Employee ID** This is the Insperity Person ID, or PerID, for the employee.
- **First Name**
- **Last Name**
- **Email** Although not required, notifications from Performance Management are sent to this email.
- **User Role** For more information on User Roles, see [What are the different user roles and what are they able to see?](#)

Add Employee

Employee Information

Employee ID *	First Name *	Middle Name	Last Name *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email	User Role Basic User <input type="text"/>		
<input type="text"/>	<small>User will be created</small>		

Job Information

- **Supervisor** By default, this supervisor on this record will be the appraiser for the employee.
- **Job Title**
- **Job Code**
- **Client Hire Date** The date the employee was hired by the company.
- **Insperity Hire Date** The date the employee became an Insperity-paid employee. This is typically the same as the Client Hire Date unless the company became a client of Insperity after the employee was hired.
- **Termination Date** If terminating an employee from Performance manually. This does not terminate the employee from Insperity.
- **Termination Type** If terminating an employee from Performance manually. This does not terminate the employee from Insperity.
- **Employment Type**
- **Active**
- **Exempt checkbox**

Job Information

Supervisor	Job Title	Job Code None - Not Assigned
<input type="text"/>	<input type="text"/>	<input type="text"/>
Client Hire Date * <input type="text"/>	Insperity Hire Date * <input type="text"/>	Termination Date <input type="text"/>
Termination Type <input type="text"/>	Employment Type <input type="text"/>	Employee Status <input type="text"/>
	Active	<input type="checkbox"/> Exempt

Performance

This section drives what template the employee will receive and who is appraising or endorsing the employee during a performance review.

- **Endorser** The endorser, by default, is the employee's assigned supervisor's assigned supervisor supervisor.
- **Alternate Appraiser** Use this field if you would like to override the default appraiser with another employee.
- **Alternate Endorser** Use this field if you would like to override the default endorser with another employee.
- **Organization Level** Optional
- **Review Template** This will be the assigned review template for the employee.

Performance Information

Endorser	Alternate Appraiser	Alternate Endorser
<input type="text"/>	<input type="text"/>	<input type="text"/>
Organization Level	Review Template	
<input type="text"/>	<input type="text"/>	

When complete, click **Save**.

SAVE

What are the different user roles and what are they able to see?

There are different scopes of views for users in the system. While the Employee and Supervisor roles are roles that are inherited based on if they supervise other employees, the Power User and HR Manager roles are elevated roles that can be assigned to a user in addition to their inherited roles. The chart below will explain the difference between the roles.

Scope of View – Who you can see

Y = Access, N = No Access

	Power User	HR Manager	Supervisor	Employee
Access your record	Y	Y	N	N
Access all employee information	Y	Y	N	N

Performance

U = Update, N = No Access

	Power User	HR Manager	Supervisor	Employee
Reviews	U	U	U	U
Notes	U	U	U	U
Goals	U	U	U	U
Bulk Print	U	U	U	N

Reports

U = Update, N = No Access

	Power User	HR Manager	Supervisor	Employee
Employee Reports	U	U	N	N
Performance Reports	U	U	U	N
Administrative Reports	U	U	N	N

Administration

U = Update, V = View, N = No Access

	Power User	HR Manager	Supervisor	Employee
Employees	U	U	N	N
Jobs	U	U	N	N
Review Templates	U	V	N	N
Competencies	U	V	N	N
Groups	U	V	N	N
Cycle-Based Reviews	U	V	N	N
On Demand Reviews	U	V	N	N
Options	U	U	N	N
Company information	U	N	N	N
Organizational hierarchy	U	U	N	N

How do I add the HR Manager or Power User role to the employee?

You can assign the Power User or HR Manager role to the employee through the **Employees** page.

Go to **Administration**.


Click on **Employees**.

Click on the name of the employee and change the **User Role** to the desired role.

Click **Save**.

Employee Information

Employee ID *	First Name *	Middle Name	Last Name *
2915895	Amy		Aaron
Email	User Role		
	Basic User		
	User will be created		

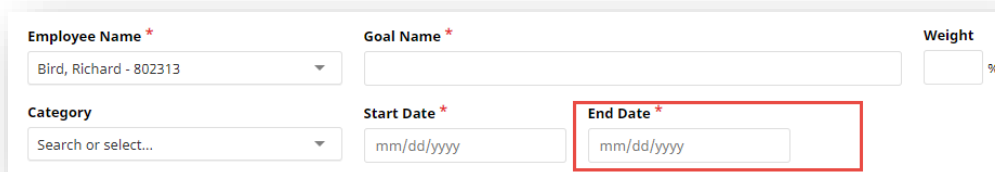


Goals and performance reviews

Frequently asked questions about goals in a performance review.

What criteria will set the difference between current and future goals?

A goal's end date determines whether the goal displays as a *Current* or *Future* goal inside a performance review. For Example: If the 2018 Performance Review dates are 1/1/18 – 12/31/18, then a goal with an end date of 6/30/19 will display as a Future goal.

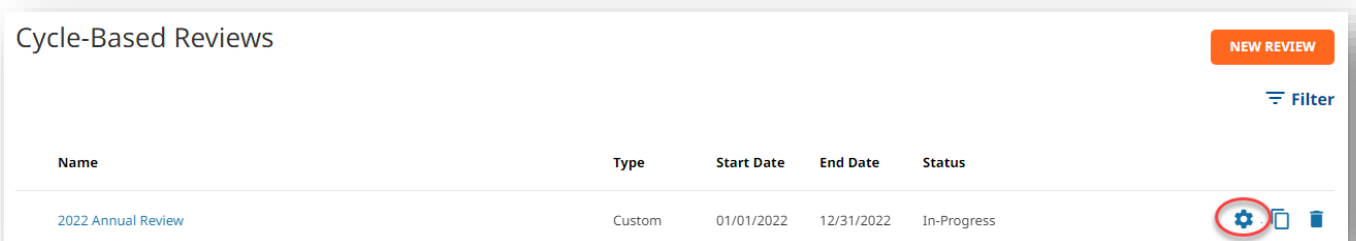


The screenshot shows a form for creating a goal. It includes fields for Employee Name (Bird, Richard - 802313), Goal Name, Weight, Category (Search or select...), Start Date (mm/dd/yyyy), and End Date (mm/dd/yyyy). The End Date field is highlighted with a red box.

My employees had goals on last year's review and now they are not showing as current goals in their current review. Why?

This will occur if the last review period had not been closed prior to kicking off the current review cycle. To close a review cycle, go to **Administration** → **Cyle-Based Reviews** → **Review Cycle Name**.

Click on the setting icon to the right of the screen:



The screenshot shows a table titled "Cycle-Based Reviews" with a "NEW REVIEW" button and a "Filter" icon. The table has columns for Name, Type, Start Date, End Date, and Status. A row is visible for "2022 Annual Review" with Type "Custom", Start Date "01/01/2022", End Date "12/31/2022", and Status "In-Progress". A settings icon (gear) is circled in red at the end of the row.

Name	Type	Start Date	End Date	Status
2022 Annual Review	Custom	01/01/2022	12/31/2022	In-Progress

Under **Workflow Steps, Step 1**, check the boxes under **Current Review Workflow Step** options and select **Closed** as the new review step under **New Review Workflow Step**.

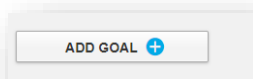
STEP 1 - Select Employee(s)
 All Employees Individual Employees

STEP 2 - Select the Current Review Workflow Step(s) that the reviews are in and select the New Review Workflow Step for reviews to proceed to

Current Review Workflow Step		New Review Workflow Step
<input checked="" type="checkbox"/> Employee	→	<input type="radio"/> Employee
<input checked="" type="checkbox"/> Appraiser		<input type="radio"/> Appraiser
<input checked="" type="checkbox"/> Endorser		<input type="radio"/> Endorser
<input checked="" type="checkbox"/> Face-to-Face		<input type="radio"/> Face-to-Face
<input checked="" type="checkbox"/> Feedback		<input type="radio"/> Feedback
<input checked="" type="checkbox"/> Completed		<input type="radio"/> Completed
		<input checked="" type="radio"/> Closed

My company kicked off its review cycle, and the employees are adding goals from the goals section in the left menu. They are not populating in the performance review. Why?

Once a review cycle has been kicked off, adding, editing, or deleting a current goal is within the actual performance review and not through the "goals" module in the left-hand menu. This feature prevents employees from adding goals outside of a review process workflow. Goals can be added to a review by going into a performance review, **Current Goals**, and selecting **Add Goal**.



Some of my employees say their goals are not populating in their reviews. What options do I have to pull them in?

The reasons why goals would not pull into a review would be because (1) the goal has already been rated in a previous review, (2) the goal end date assigned to the goal is not within the range of the review period, or (3) if it was a future goal located in a previous review that was not closed out by the administrator.

Options for populating goals in a current review would be to delete the review or the entire review cycle, correct the goal error, and relaunch the review. This option will delete all information already populated for those employees who have already started their review.

This option would be used when the previous review was not closed out, and these goals were future goals.

The other option is to re-enter the goals within the live performance review.

Preparing for and kicking off your review cycle

I would like a checklist to prepare for my upcoming review cycle.

Review Cycle Pre-Launch Check List

<input checked="" type="checkbox"/> Verify employee information	<ul style="list-style-type: none"> Administration <li style="background-color: #008000; color: white; padding: 2px;">Employees Jobs Review Templates Competencies 	<p>Tip: Run an employee Detail Report: Click Reports - Employee Detail</p> <p><u>Check that:</u></p> <ul style="list-style-type: none"> - New hires have been added. - Terminated employees have been terminated. - Supervisors are accurate for the employees. - Job titles are accurate for the employees.
<input checked="" type="checkbox"/> Verify all employees have appropriate templates	<ul style="list-style-type: none"> PERFORMANCE Home Reviews Notes Goals Bulk Print <li style="background-color: #008000; color: white; padding: 2px;">Reports 	<ul style="list-style-type: none"> - Run a Review Template Assignment Report. - Go to Reports - Review Template Assignment Report. - To re-assign a template to an employee, go to: Employees - Employee - Performance Information - Review Template.
<input checked="" type="checkbox"/> Create your review Period	<ul style="list-style-type: none"> Administration Employees Jobs Review Templates Competencies Groups <li style="background-color: #008000; color: white; padding: 2px;">Cycle-Based Reviews On Demand Reviews 	<ul style="list-style-type: none"> - Create your review cycle. - Go to Administration - Cycle-Based Reviews - New Review. - Follow the guided steps to create a new review cycle.
<input checked="" type="checkbox"/> Run audit reports	<ul style="list-style-type: none"> PERFORMANCE Home Reviews Notes Goals Bulk Print <li style="background-color: #008000; color: white; padding: 2px;">Reports 	<ul style="list-style-type: none"> - Once the cycle has been set up, a Pre-Review Audit can be ran. - Review Period Employee Inclusion report is also recommended: Go to Reports - Review Period Employee Inclusion Report.
<input checked="" type="checkbox"/> Kick off your review	<ul style="list-style-type: none"> Administration Employees Jobs Review Templates Competencies Groups <li style="background-color: #008000; color: white; padding: 2px;">Cycle-Based Reviews On Demand Reviews 	<ul style="list-style-type: none"> - Go to Administration - Cycle-Based Reviews - Kick Off.

What is the workflow in the review process?

You can customize the review cycle to include various participants in the performance review cycle. The review process can include all the participants listed in the chart below. The only required participant would be the appraiser in a review.

The system administrator selects which steps are included when creating the review period. If either the employee or endorser step is not included in the process, that step will be skipped, and the next step will automatically occur.

Employee: The employee can complete a self-evaluation/post-review feedback.

Appraiser: The appraiser will always be required to participate in the performance review process.

Endorser: The endorser is a read-only approver in the performance review process.

Performance Review Process Steps

EMPLOYEE	<ol style="list-style-type: none"> 1. Employee receives an email notification to complete Employee Self-Review. 2. Employee completes Employee Self-Review and clicks on Send to Appraiser.
APPRAISER	<ol style="list-style-type: none"> 3. Supervisor receives an email notification to complete an Appraiser Review. 4. Supervisor completes Appraiser Review and clicks Send to Endorser (if Endorsers are included) otherwise, clicks Ready for Face to Face.
ENDORSER	<ol style="list-style-type: none"> 5. Endorser receives an email notification to complete Endorser Review. 6. Endorser completes Endorser Review and clicks on Endorse.
APPRAISER	<ol style="list-style-type: none"> 7. Appraiser receives an email notification to complete face-to-face discussion. 8. Appraiser completes face-to-face discussion with the employee (the employee is not able to view the appraiser review online at this point; the supervisor needs to print a copy for the employee). 9. Appraiser goes into PerformSmart and clicks Face-to-Face Complete (the employee will now be able to view the Appraiser Review online).
EMPLOYEE	<ol style="list-style-type: none"> 10. Employee receives an email notification to enter Post Review Feedback. 11. Employee goes into PerformSmart and enters Post Review Feedback and clicks Submit.

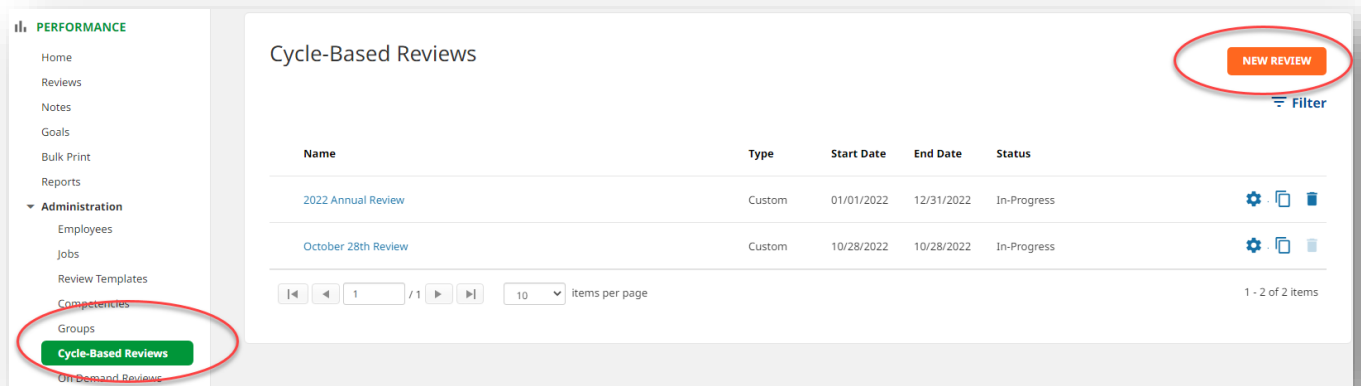
I need to create my review period. Where do I go to set that up?

When creating a review cycle, you have two choices of the type of review. An **anniversary** review is chosen if the employee's hiring date anniversary will be used to define the review period. A **custom** review for if you want to set the dates of the review period yourself. [This guide is for the custom review cycle.](#)

Navigation

Go to the **Administration** menu item. Click on **Cycle-Based Reviews**.

Click the **New Review** button on the right to create a new review period.



The screenshot displays the 'Cycle-Based Reviews' interface. On the left, the 'Administration' menu is expanded, and 'Cycle-Based Reviews' is highlighted. The main area shows a table with two review entries:

Name	Type	Start Date	End Date	Status	
2022 Annual Review	Custom	01/01/2022	12/31/2022	In-Progress	⚙️ 📄 🗑️
October 28th Review	Custom	10/28/2022	10/28/2022	In-Progress	⚙️ 📄 🗑️

Below the table, there are pagination controls showing '1' of 1 items and '10' items per page. A 'NEW REVIEW' button is circled in red in the top right corner of the main content area.

Complete the Review Period Information


Complete the following review period details:

Review Details

Type in an appropriate name for the review period.

Select a review period type **Custom** for the review period.

Review Details

 Check the box below to flag the review cycle as a **Test Review**, which is used to ensure employees and/or templates are set up correctly. Once you've determined everything is correct, the review cycle can be deleted.

Review Name

Test Review


Review Type

Custom Anniversary

Ratings

Choose if this review cycle will be **using 1/2star increments** by checking the checkbox. If not selected, the reviews will only rate in whole star increments.

Ratings

 Check the box below to give supervisors and employees the ability to rate in ½ star increments. (**Example: 3 stars or 3 ½ stars**)
Once a **Custom Review** is kicked off, this selection cannot be changed for this review cycle.

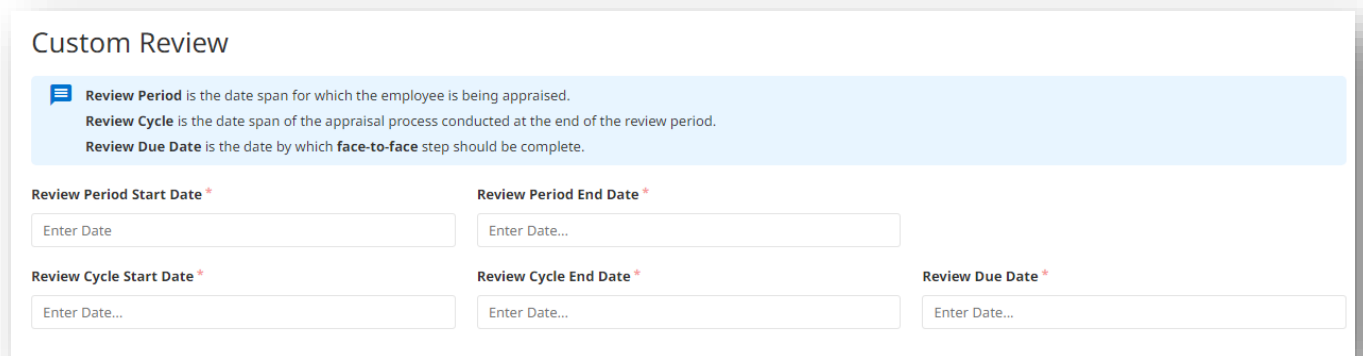
Use ½ Star Rating Increments

Custom Review

Select your **Review Period Start Date** and **Review Period End Date**. This will be the period of time that the employees' performance will be evaluated.

Enter **Review Cycle Start Date** and **Review Cycle End Date**. These dates span the amount of time in the appraisal process that occurs at the end of the review period.

Enter a **Review Due Date** that signifies the date the face-to-face review should be complete. This date should occur before or on the review cycle end date.



Custom Review

Review Period is the date span for which the employee is being appraised.
Review Cycle is the date span of the appraisal process conducted at the end of the review period.
Review Due Date is the date by which **face-to-face** step should be complete.

Review Period Start Date *

Review Period End Date *

Review Cycle Start Date *

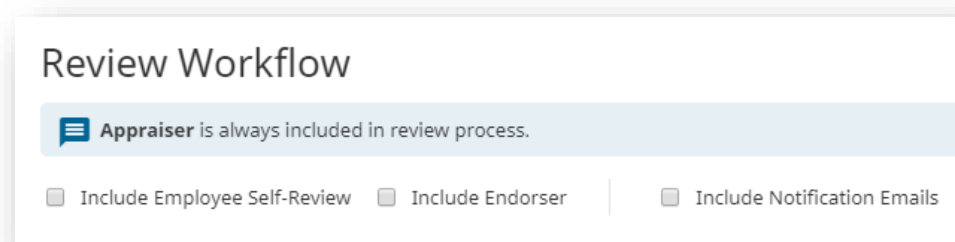
Review Cycle End Date *

Review Due Date *

Review Workflow

Choose the **Review Cycle Workflow** (process) for this review period. Appraisers are always included in the process; employees and endorsers are optional.

Check **Include Notification Emails** if you want emails to be sent to affected personnel during each review cycle step. You can preview the emails after making the section.



Review Workflow

Appraiser is always included in review process.

Include Employee Self-Review Include Endorser | Include Notification Emails

Employee Exclusions

By default, all employees are automatically included in the review period. If you need to exclude some employees from having a performance review, specify which employees are to be excluded from this review period by using the **Add** buttons next to the exclusion criteria. For example, if you would like to exclude

employees from the review based on Job Code, you would select the **Add** next to the job code. Select the Job title then click the **Add** button.

Employee Exclusions

- Employee + Add
- Supervisor + Add
- Org Level + Add
- Job Code + Add
- Hire Date + Add

You can exclude based on multiple criteria; Name, Organization Level, Job Code, Supervisor, and/or a Hire Date Range.

Excluded employees will appear below in an excluded list:

<input checked="" type="checkbox"/>	Kind, Mary	4251226	Boys, Rene	Org Level Not Assigned	Employee - 28282	07/05/2018	1
<input checked="" type="checkbox"/>	Saint, Yes	87865	Rower, Power	Org Level Not Assigned	Employee - 28282	03/01/2018	1
<input checked="" type="checkbox"/>	Smith, Sally	76765657	Berry, Justin	Org Level Not Assigned	Employee - 28282	03/01/2018	1

You can chose to run a pre-review audit after saving which will allow you to identify any issues that will prevent a cycle from kicking off such as missing or terminated appraisers, missing review templates, or invalid job codes.

Run Pre-Review Audit after saving review cycle

Save your Review Period Information

Use the **Save** icon in at the bottom of the page to save this review period.

If you have selected to run a Pre-Review audit report, you will be able to identify and correct errors before kicking off the cycle. To save the review and make corrections uncheck the Pre-Review Audit report selection.

Pre-Review Audit EXPORT TO PDF

5 Employee have errors that will prevent kick-off.

8 Employees have no errors that will prevent kick-off.

6 Employees are missing endorser. Missing endorser will not prevent kick-off.

Employee Name	Employee ID	Template	Job Code	Appraiser	Endorser
Admin, Anna	1234			×	×
Appraiser, Alexander	9877				×
Appraiser, Andy	5678	×			
CEO, Charlie	9881				×
McDonagh, Noel	9879				×

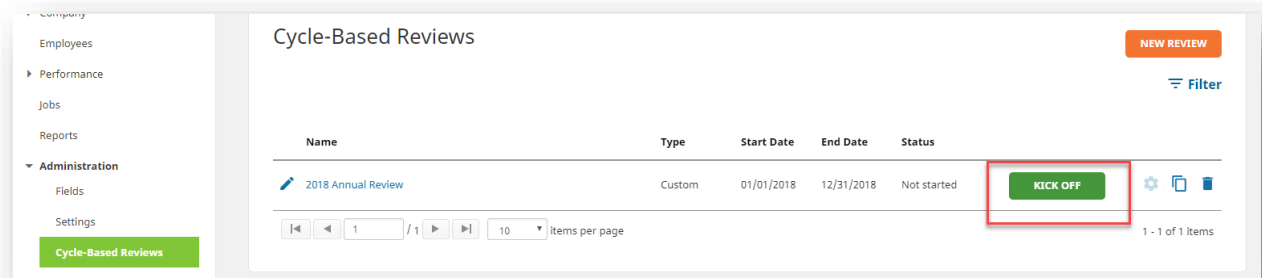
1 / 2 5 items per page 1 - 5 of 8 items

CLOSE

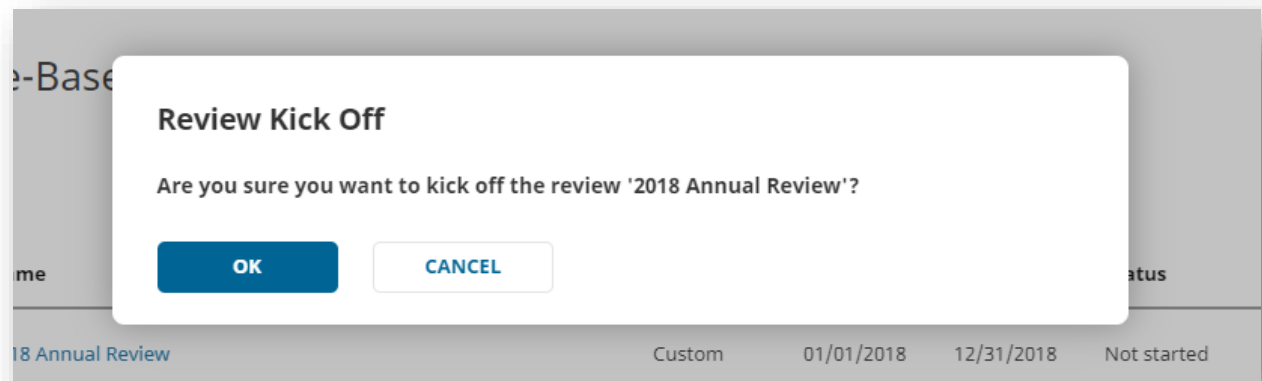
We are ready to launch our review cycle, what's our next step?

Go to the **Administration** menu item. Click on **Cycle-Based Reviews**.

Click on the **Kick Off** button next to the appropriate review period name.



Click on **OK** in the confirmation message (this will send out the first email notifications to employees if notifications were selected).



If there are any errors that prevent the performance review cycle from kicking off, an email will be sent to the power users of the system outlining what errors need to be corrected. Notifications will also be available in the **Notifications** section of the home page.




Managing your cycle

I forgot to add someone to the review; can I get them into this cycle?

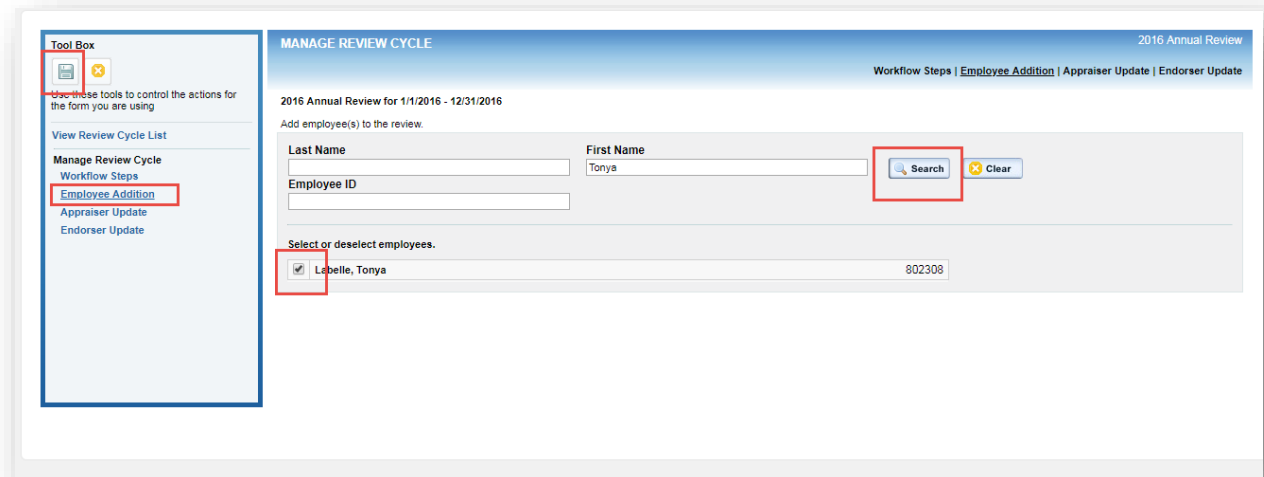
After your cycle has been launched, you can add employees to the review cycle by navigating to **Administration** → **Cycle-Based Reviews** → **Review Name** → **Manage icon**.

Cycle-Based Reviews NEW REVIEW

Filter

Name	Type	Start Date	End Date	Status	
2022 Annual Review	Custom	01/01/2022	12/31/2022	In-Progress	  

- Navigate to **Employee Addition** in the **Tool Box**.
- Search for the employee.
- Check the employee name.
- **Save** from the **Tool Box**.



Tool Box

Use these tools to control the actions for the form you are using

- View Review Cycle List
- Manage Review Cycle
 - Workflow Steps
 - Employee Addition**
 - Appraiser Update
 - Endorser Update

MANAGE REVIEW CYCLE 2016 Annual Review

Workflow Steps | **Employee Addition** | Appraiser Update | Endorser Update

2016 Annual Review for 1/1/2016 - 12/31/2016

Add employee(s) to the review.

Last Name First Name

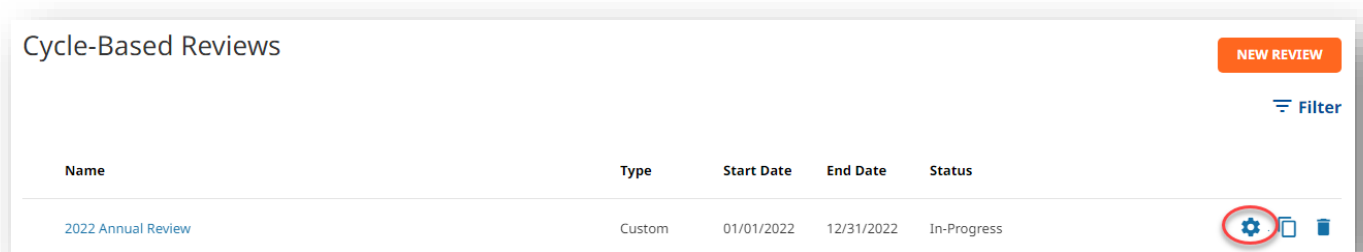
Employee ID




Select or deselect employees.

<input checked="" type="checkbox"/>	Lebelle, Tonya	802308
-------------------------------------	----------------	--------

I need to change the appraiser/endorser on a review. Where do I go?

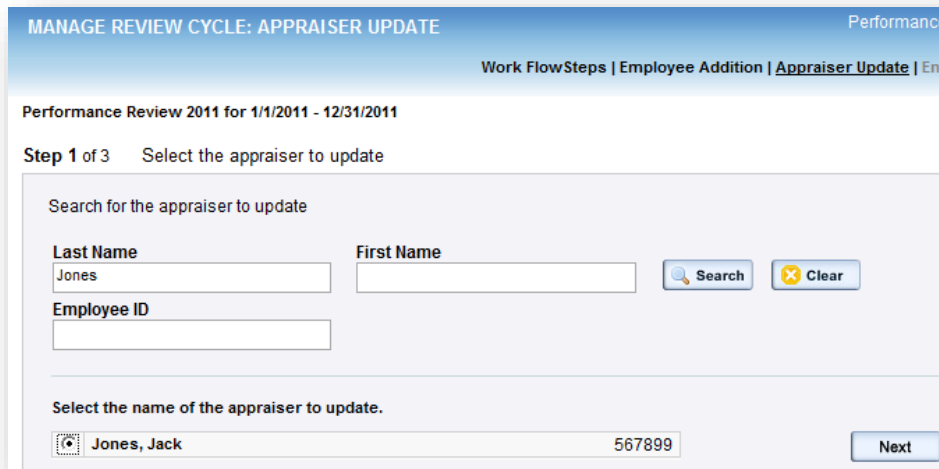
After your cycle has been launched, you can add employees to the review cycle by navigating **Administration** → **Cycle-Based Reviews** → **Review Name** → **Manage** icon.



Name	Type	Start Date	End Date	Status	
2022 Annual Review	Custom	01/01/2022	12/31/2022	In-Progress	  

To update an appraiser,

- Click **Appraiser Update** in the **Tool Box**.
- Search for the appraiser who will be updated.



MANAGE REVIEW CYCLE: APPRAISER UPDATE Performance

Work FlowSteps | Employee Addition | **Appraiser Update** | End

Performance Review 2011 for 1/1/2011 - 12/31/2011

Step 1 of 3 Select the appraiser to update

Search for the appraiser to update

Last Name: First Name:

Employee ID:

Select the name of the appraiser to update.

567899

- Click **Next**.
- Search for the new appraiser.

Step 2 of 3 Select the new appraiser

Search for the new appraiser to update

Last Name: First Name:

Employee ID:

Select the name of the new appraiser.

Alan, Cole

- Select all of the employee reviews that will update with the change in the appraiser.
- Click **Next**.
- **Save** from the **Tool Box**.

To update an endorser,

- Click **Endorser Update** in the **Tool Box**.
- Search for the endorser who will be updated.

MANAGE REVIEW CYCLE: ENDORSER UPDATE Workflow Steps | Employee Addition

2016 Annual Review for 1/1/2016 - 12/31/2016

Step 1 of 3 Select the endorser to update

Search for the endorser to update

Last Name: First Name:

Employee ID:

Select the name of the endorser to update

Torres, Maria

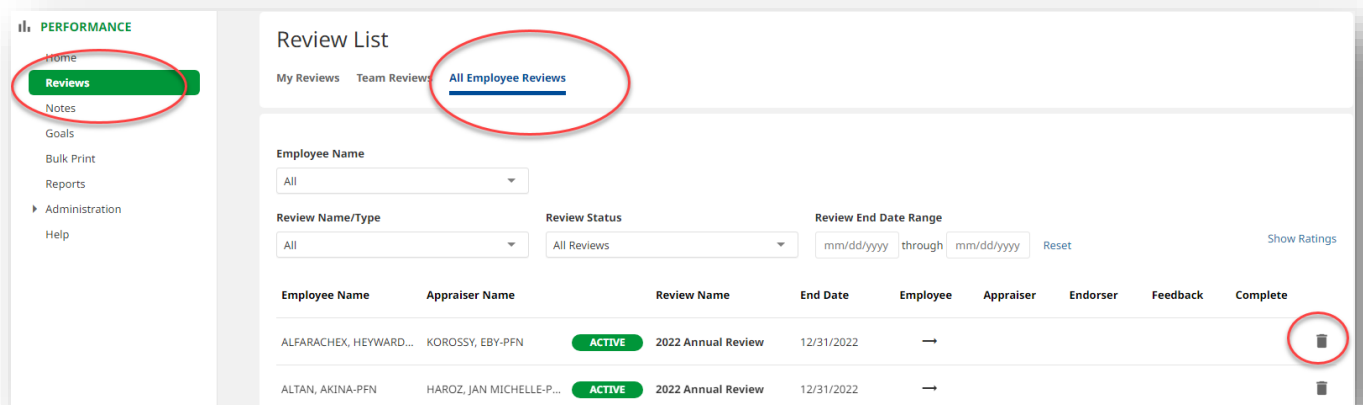
- Click **Next**.
- Search for the new endorser.
- Select all of the employee reviews who will update with the change in the endorser.
- Click **Next**.
- **Save** from the **Tool Box**.

The job is incorrect for an employee, and I have already kicked off the review. How can I update this?



Once a review has been kicked off, an employee's job assignment cannot be changed in a live review. To correct job information, the administrator can delete the employee's review and add them back to the cycle.

Delete the performance review

Go to **Performance** → **Reviews** → **All Employee Reviews** and find the employee's review. Use the garbage can icon to delete. **IMPORTANT:** All information will be lost when you delete a review.



The screenshot shows the 'PERFORMANCE' sidebar with 'Reviews' highlighted. The main area is titled 'Review List' and has tabs for 'My Reviews', 'Team Reviews', and 'All Employee Reviews'. Below the tabs are filters for 'Employee Name', 'Review Name/Type', 'Review Status', and 'Review End Date Range'. A table lists two reviews:

Employee Name	Appraiser Name	Review Name	End Date	Employee	Appraiser	Endorser	Feedback	Complete
ALFARACHEK, HEYWARD...	KOROSSY, EBY-PFN	2022 Annual Review	12/31/2022	→				
ALTAN, AKINA-PFN	HAROZ, JAN MICHELLE-P...	2022 Annual Review	12/31/2022	→				

Correct the employee information

To correct a job title, navigate to **Administration - Employees** and select the employee. Go to **Job Information** and then in the profile to make changes. **Save.**

Job Information

Supervisor	Job Title	Job Code None - Not Assigned	
Client Hire Date *	Insperty Hire Date *	Termination Date	Termination Type
Employment Type	Employee Status Active	<input type="checkbox"/> Exempt	

Add the employee back into the cycle

To re-kick off the employee's review with the correct information, go to **Administration** → **Cycle-Based Reviews** → **Review Name** → **Manage icon**. Navigate to the **Employee Addition** menu link. Search for the employee and check the box next to their name. **Save**.

MANAGE REVIEW CYCLE 2016 Annual Review

Workflow Steps | **Employee Addition** | Appraiser Update | Endorser Update

2016 Annual Review for 1/1/2016 - 12/31/2016

Add employee(s) to the review.


Last Name	First Name	Search	Clear
	Tonya	<input type="text"/>	<input type="text"/>
Employee ID			

Select or deselect employees.

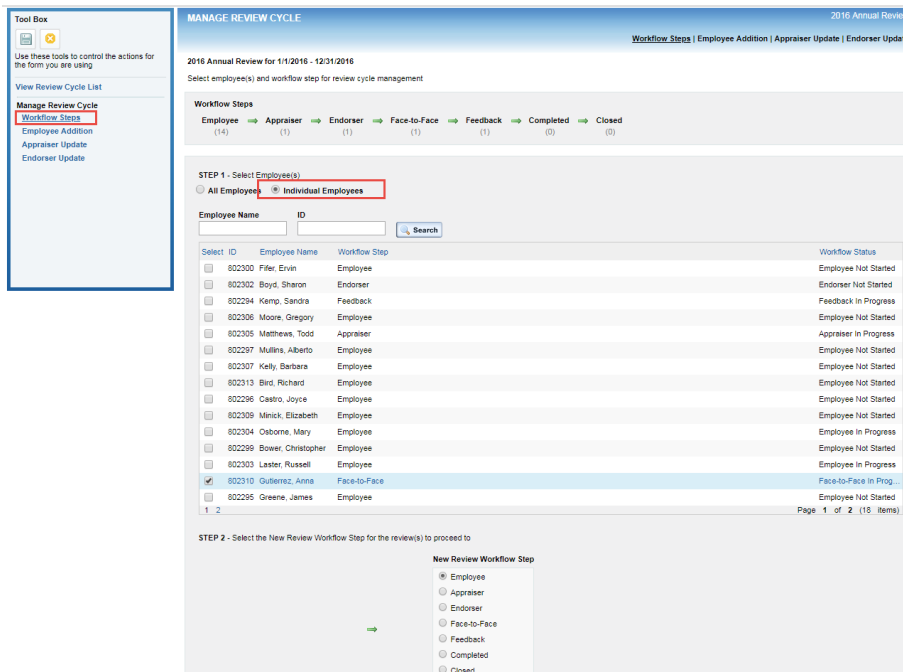
<input checked="" type="checkbox"/>	Labelle, Tonya	802308
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An appraiser has finished a face-to-face but needs to change something in a review. How do I move back the review?

The administrator can manually move review forms to a different step in the workflow process once a review cycle has already been launched by navigating **Administration → Cycle-Based Reviews → Review Name → Manage icon**.

Name	Type	Start Date	End Date	Status	
2022 Annual Review	Custom	01/01/2022	12/31/2022	In-Progress	

In the **Tool Box**, select **Workflow Steps**. In **Step 1**, select **Individual Employees** and find the employee whose review needs to move back in the cycle. Place a check next to their name. Next in **Step 2**, select the **New Review Workflow Step** and **Save** in the **Tool Box**.



The screenshot shows the 'MANAGE REVIEW CYCLE' interface for a 2016 Annual Review. The workflow steps are: Employee (14) → Appraiser (1) → Endorser (1) → Face-to-Face (1) → Feedback (1) → Completed (0) → Closed (0). The 'Tool Box' on the left has 'Workflow Steps' highlighted. In 'STEP 1 - Select Employee(s)', 'Individual Employees' is selected, and a search results table is shown. In 'STEP 2 - Select the New Review Workflow Step for the review(s) to proceed to', 'Employee' is selected.

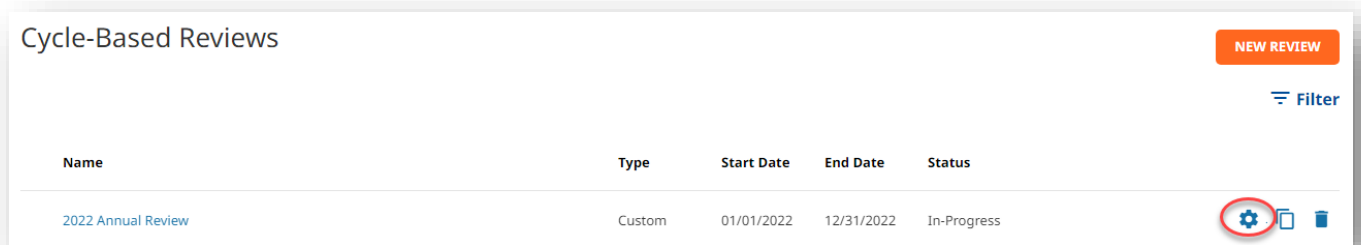
Select	ID	Employee Name	Workflow Step	Workflow Status
<input type="checkbox"/>	802300	Fifer, Ervin	Employee	Employee Not Started
<input type="checkbox"/>	802302	Boyd, Sharon	Endorser	Endorser Not Started
<input type="checkbox"/>	802304	Kemp, Sandra	Feedback	Feedback In Progress
<input type="checkbox"/>	802306	Moore, Gregory	Employee	Employee Not Started
<input type="checkbox"/>	802305	Matthews, Todd	Appraiser	Appraiser In Progress
<input type="checkbox"/>	802297	Mullins, Alberto	Employee	Employee Not Started
<input type="checkbox"/>	802307	Kelly, Barbara	Employee	Employee Not Started
<input type="checkbox"/>	802313	Bird, Richard	Employee	Employee Not Started
<input type="checkbox"/>	802296	Castro, Joyce	Employee	Employee Not Started
<input type="checkbox"/>	802309	Minsk, Elizabeth	Employee	Employee Not Started
<input type="checkbox"/>	802304	Osborne, Mary	Employee	Employee In Progress
<input type="checkbox"/>	802296	Bower, Christopher	Employee	Employee Not Started
<input type="checkbox"/>	802303	Laster, Russell	Employee	Employee In Progress
<input checked="" type="checkbox"/>	802310	Guierrez, Anna	Face-to-Face	Face-to-Face In Prog...
<input type="checkbox"/>	802295	Greene, James	Employee	Employee Not Started

Why do I need to close my review cycle, and how do I do this?

It is important to close a Review Cycle once the reviews have been completed. Closing a cycle will allow any future goals to be available for the next review cycle to be included as future goals, depending on the end date of that goal.

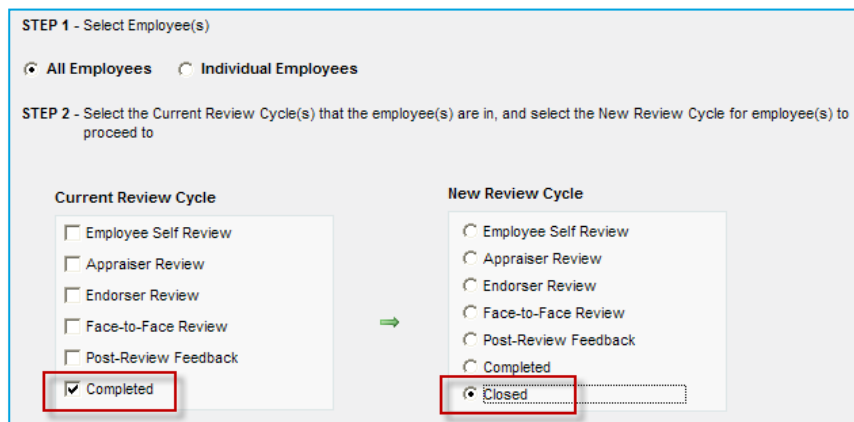
Important: Once you close a review cycle, employees will no longer be able to make changes to their reviews and you will no longer be able to reopen the forms for changes.

To close a review cycle, navigate to **Administration** → **Cycle-Based Reviews** → **Review Name** → **Manage icon**.



In the **Tool Box**, select **Workflow Steps**. In **Step 1**, select **All Employees**.

Click the **Completed** in the **Current Review Cycle** list and **Closed** in the **New Review Cycle** list to close out all complete reviews. **Save** from the **Tool Box**.



Glossary of terms

Term	Definition
User Management	
Employees	An "employee" is someone who works within the company structure and will need performance reviews created for them, but is not necessarily a user.
Power User	A Power User has the highest level of access to all companies and functionality within the system. The system administrator is set-up with this role. This role has access to every feature and module, including access to all employee data, the set-up and maintenance of review templates, review periods, and other features.
Supervisor	This role has subordinates reporting to their position and may be identified as manager or team lead among other titles in the Org.
Email	The email address that will be used for all future communications for this user.
Configuration Components	
Code	A unique number must be given to every job title entered into the system.
Competencies	Contained within the system, there is a list of standard competencies from industry best practices. These standards cannot be edited or changed, but you can view its factors to determine whether the competency is applicable.
Competency Factors	These are the abilities needed to perform the tasks in a role or job. For each competency, there will be a set of competency factors.
Review Template	The review template will provide specific details that govern what the final review form will look like. One can set up as many review templates as needed for each company.
Rating	Ratings will define how the rating system is set-up for a review template (e.g. 1-4, 1-5, etc.)

Term	Definition
Weighting	Weightings will identify how weight is distributed among the sections of a review. One or more of those sections must be on the review template in order to set weightings here. Total weightings must equal 100%.
Performance Groups	Groups enable the system administrator to group employees together so that one can easily assign a specific review template to all employees belonging to the group.
<i>Review Section Properties</i>	
Current Goals	Employee's goals that have end dates falling within the review period beginning and end date.
Future Goals	Employee's goals that have end dates falling after the review period end date.
Development Plan	The Development Plan section will, at review time, display selected coaching ideas based on choices made when rating performance competencies.
Summary	Reviewers can enter free-form text information on the review form to summarize the overall rating.
Employee Post-Review Feedback	This section, when included on a review, is only editable by the employee at the end of the review process (Employee Self-Review option must be in used in order to edit online).
<i>Review Period Management</i>	
Review Period	The period of time over which employees will be reviewed.
On-demand reviews	A "real-time" review that can be created at any time for employees for which the logged-in user is a supervisor (appraiser).
Anniversary Review	A review period that is automatically kicked off for each employee based on hiring date. The review dates for an anniversary review are the employee's hire date to the day prior to the employee's hire date of each year.
Custom Review	A review period in which the system administrator chooses the review period dates.

Term	Definition
Review Cycle Workflow	The type of workflow chosen to execute the review (e.g., employee self-review). For example, if your organization does not have the Employee Self-Review option, your review cycles will not include the employee in the process.
Review cycle start and end date	When the review cycle starts in relation to the review period. The review cycle triggers when reviews start and completion notifications should be issued.
Kick-off (a review cycle)	Start or launch a review cycle process.
Appraiser	A supervisor or manager that will complete the employee's review. This is defined as the employee's assigned supervisor.
Endorser	A 2nd level reviewer after the supervisor. This is defined as the employee's assigned supervisor's assigned supervisor.