

sage

People

Customer Support Guide

Performance Review Process



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Package	Version	Date
HCM	17.50	14/02/2017
	19.50	14/07/2017

Purpose

This guide explains the Performance Review process. For detailed information please refer to the HCM Configuration Guide which can be found in [Sage Business Cloud People Support](#).

Rationale

The Performance Review process implements a performance review of a team member by the team member's manager, with contributions by the team member. The review is completed annually, or sometimes twice a year. It is a summary of the overall performance of a team member over the review period.

A key output is the performance rating for the team member. This is used in other processes such as talent management and succession planning. It is also used for pay and bonus planning.

The crucial part of the performance review is the review meeting between manager and team member. Each part of the performance review of a team member:

- Preparation
- Approval by HR
- Comments after the meeting

...is recorded in the system by the manager. The team member can enter comments, and the review can also include a **self performance** review entered by the team member about themselves. A self performance review can only be created as part of a performance review.

You can produce a PDF of the Performance Review at each stage of the process –

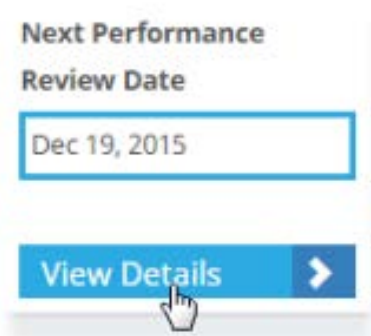
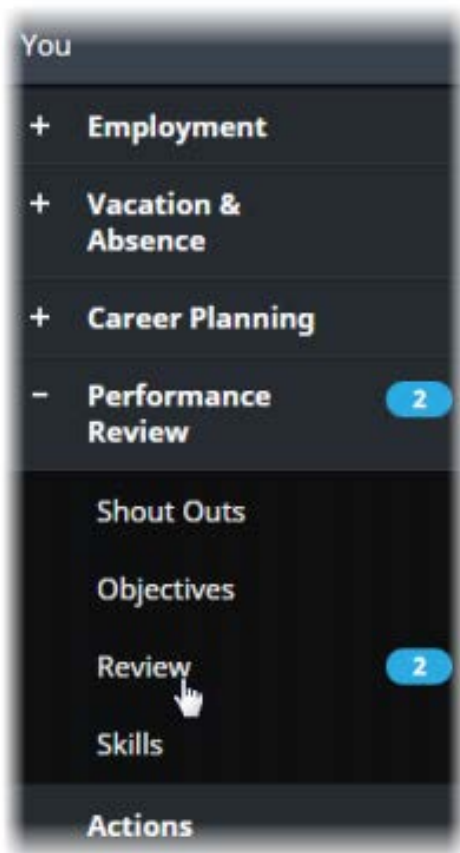
 Create Adobe PDF version

select

on the Performance Review Detail view. Typically, a PDF is produced and used as an attachment to an email at the end of the process.

Viewing Your Performance Review

You can view your Performance Review by selecting the tab on WX or on the Performance Review tile select **View Details**.



WX displays the Performance Review Detail view with the Reviews categorized as **Current** and **Previous**:

Performance Review

CURRENT

[Reveal to Team Member](#) ¹
[Edit](#) ¹

STATUS

Draft

[VIEW DETAILS](#) [+](#)

[Create Adobe PDF version](#)

PREVIOUS

07 Jul 2015

STATUS

Completed

[VIEW DETAILS](#) [+](#)

[Create Adobe PDF version](#)

- The Performance Review Detail view includes buttons enabling you to edit an uncompleted Review or progress it to the next stage.
- Select **View Details** to drill down.
- Select **Create Adobe PDF version** to produce a PDF version of the Performance Review. The PDF includes objectives for the Team Member - current objectives and those closed within the last business year.

Viewing a Performance Review for a Team Member

You can view the Performance Reviews for your direct reports by selecting the Team Member. In the Service Bar, select the WX Service hosting the Performance Review process.

NOW VIEWING: LINDA HALLIWELL

Employment | Vacation & Absence | Career Planning | **Performance Review**

The Performance Review Tile summarizes the current position for the Team Member:

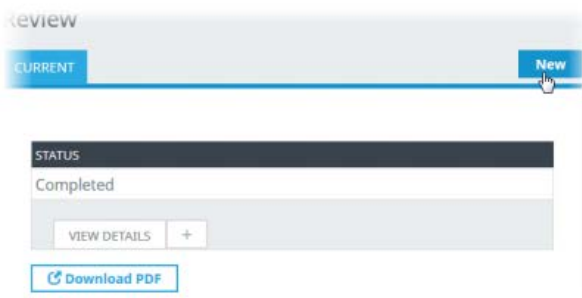
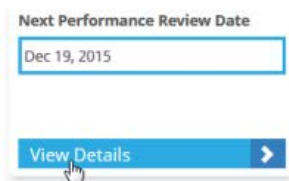
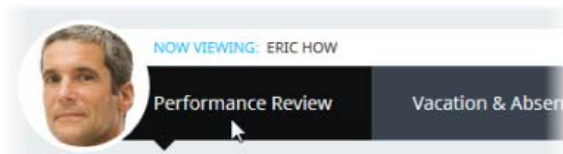
Review
Current
Ongoing
Status
Draft
Next Performance Review Date
Dec 19, 2015
View Details

Select **View Details** to display the Detail view of the Performance Review for the Team Member:

New Performance Review

A manager can create a new performance review for one of their direct reports if there is no ongoing review. Team Members can only have one active Performance Review at one time.

If the team member has a performance review already entered in **Draft**, **Approved**, or **Revealed** status you cannot create another review, and WX displays the current performance review. **A team member cannot have two performance reviews ongoing at the same time.**



** If a Performance Review requires approvals, after saving the review is set to status **Draft**.

Annual Average Scores

Compute and display average scores based on all reviews since the last annual review:

- Annual Average Competency Score
- Annual Average Objective Score

The averages are calculated from all scores by all reviewers, including self review scores. They provide a useful reference when conducting a Performance Review for a Team Member, enabling comparison with the scoring awarded by other reviewers across your organization.

Scores are displayed in the Performance Review Detail view, in the Additional Details section.
Additional details can be displayed for both mid-year and annual performance reviews.

Performance Review Status

Draft

Performance reviews in **Draft** status have been newly entered by the manager. The team member cannot yet see what has been entered - the performance review must first be **revealed**. There may be a requirement for the performance review to be approved by HR before it can be revealed to the team member - this requirement is set by the HR manager in the Sage People Policy for the department.

Depending on the approval requirement, the manager can;

- **Submit** for HR approval
- **Reveal** to the team member

Typically, the manager cannot edit the performance review after it has been submitted or revealed.

Approved

Performance reviews in **Approved** status have been entered by the manager and approved by HR. They are ready to be revealed to the team member.

To reveal the performance review to the team member, on the Performance Review detail view, select **Reveal**. The status changes to **Revealed**.

Self Performance Review

A self performance review is created by the team member as part of a performance review. It is an opportunity for the team member to comment on their own performance during the year.

A self performance review in **Revealed** status is one that has been entered and revealed by the team member. Typically, the team member cannot edit a self performance review after it has been revealed.

As the team member, you are now ready for the performance review meeting with your manager. The review meeting is the most important part of the performance review process. By making your own notes you will be well prepared for it. After the meeting you must **sign the performance review before the manager can sign**.

You are not necessarily signing that you agree with your manager, although that is preferable. You are signing to acknowledge that the performance review has taken place. You do have an opportunity to add a final comment before you sign. The manager cannot add any further comments to the performance review.

Revealed Performance Review

Performance reviews in **Revealed** status have been entered by the manager, sent for approval by HR if that is a requirement in your organization, and revealed to the team member.

Typically, the manager cannot edit a performance review after it has been revealed.

The manager now holds the performance review meeting with the team member.

After the

meeting the performance review is signed by the manager. If there is a self performance review then the performance review cannot be signed by the manager until:

- The self performance review has been revealed to the manager.
- The self performance review has been signed by the team member.

When these conditions are met the manager can sign the performance review:

- On the Performance Review detail view, select **Sign**.

The status changes to **Completed**.

Completed Self Performance Review

A self performance review in **Completed** status is one that has been entered, revealed and signed by the team member. This releases the linked performance review for signing by the manager. A Completed Performance Review cannot be edited by anyone.

Completed Performance Review

A performance review in **Completed** status is one that has been entered, revealed and signed by the manager. If a self performance review was included, then this must have been completed too. A Completed Performance Review cannot be edited by anyone.

**** If your organization needs to edit reviews after they have been revealed or completed your HR Manager or System Administrator has access to do this. Instructions can be found in the guide [How to Reopen a Competency Assessment](#) . Although this guide refers to Competency the process is the same to re-open a Performance Review, ensure you remove the **Signed Date** when reverting to **Draft** status. Within the profile **Record Type Settings** select Performance and Self Performance instead of Competency.**



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Related Documentation

How to re-open a Competency Assessment