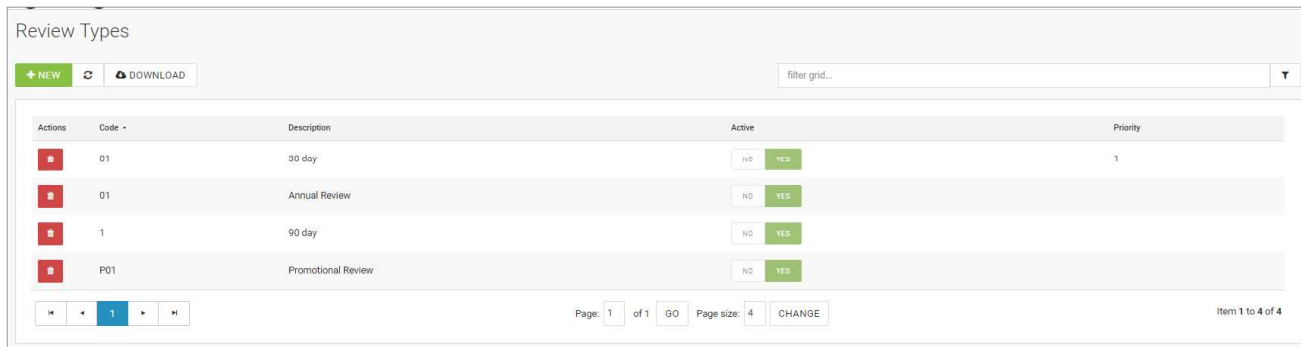


Employee Review Screens in Advanced HR 2.0

Review Types are the names or categories given to different kinds of employee reviews for a company to use in the performance review process. For example:

- An annual review
- A 90-Day review



Actions	Code	Description	Active		Priority
	01	30 day	NO	YES	1
	01	Annual Review	NO	YES	
	1	90 day	NO	YES	
	P01	Promotional Review	NO	YES	

Each review type might have a different reviewer, template/document, or timeline associated with it. Review templates can be added to each review type to improve policy compliance and facilitate administration of reviews.

You can view a list of the employee's completed and scheduled performance reviews. Clicking on a specific review on the summary screen provides review details and any attached documents.

Administrators create Review Types on the **HR Admin – Company Setup – Review** screen. Once they are setup, they can be used in the performance review process with employees. Refer to the Advanced HR 2.0 Administrator Guide to learn [how to create Review Types](#).

Once Review Types have been set up by the Administrator (in **HR Admin - Company Setup - Review**), reviews can be assigned to an employee and scheduled.

Assigning and Scheduling a Review to an Employee

To assign and schedule a review for an employee:

1. Go to **HR Admin – Employee Maintenance – Review**.
2. The system displays the **Reviews** dashboard.
3. Click on the **+ New** button.
4. The system displays the **Review New Record** screen.

5. If you are not already locked on to an employee, select the employee now from the **Employee** dropdown.
6. In the **Review Info** section, select the **Review Type** from the dropdown.

If the **Review Type** you need does not exist, you can click the blue Plus sign and create a new Review Type here 'on the fly.'

7. In the **Status** dropdown, indicate the current status of the review. When first scheduling a review, you would select the **S – Scheduled Status**.
8. Select the person who will conduct the review in the **Reviewer** dropdown.
9. Select the **Scheduled Date**. This field is not required here now and can be entered or changed later.
10. Once the review has been completed, you can return to this screen to enter the **Completed Date** and the **Rating**.
11. The **Employee Acknowledged** toggle will change from **No** to **Yes** if a Notification has been sent to the employee and the employee acknowledged receiving it. To learn more, refer to the Notifications section of this guide.
12. If needed, complete the **Second Reviewer** section.
13. In the **Details** section, you can enter **Review Notes** and **Private Notes**.

- The **Review Notes** can be viewed by the Employee.
 - The **Private Notes** can be only be seen by the Reviewer and employees who have access to the Employee Maintenance Review.
14. The **Review Template** section here will display any review template information that was populated by the Admin on the **Review Type** creation screen.
 15. In the **Documents** section, you can upload any needed documentation for the employee's review and this can be done at any time – before, during, or after the review.
 16. When complete, click the **Save Changes** button.

The system returns you to the **Reviews** dashboard.

The Employee View of the Review

The employee can sign in to the system to view their review:

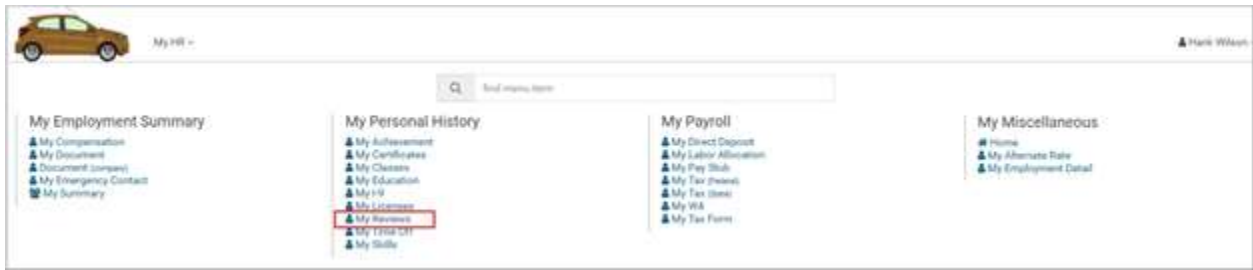
1. The employee displays their company **Dashboard**.
2. On the employee's **Dashboard**, there is a **My Upcoming Reviews** section on the right side of the **Dashboard** that displays any of their upcoming reviews at a glance.

The screenshot shows the employee dashboard for Jefferson Marks. The dashboard includes sections for Company Announcements, My Time Off, My Upcoming Reviews, My Expiring Certifications, and My Expiring Licenses. The 'My Upcoming Reviews' section is highlighted with a red box and contains the following table:

Date	Reviewer	Type	Acknowledge
09/20/2018	Kowalski, Felix	P01	

Another location the employee can see their review history is by going to their **My HR** screen:

1. Go to **My HR – My Personal History – My Reviews**.



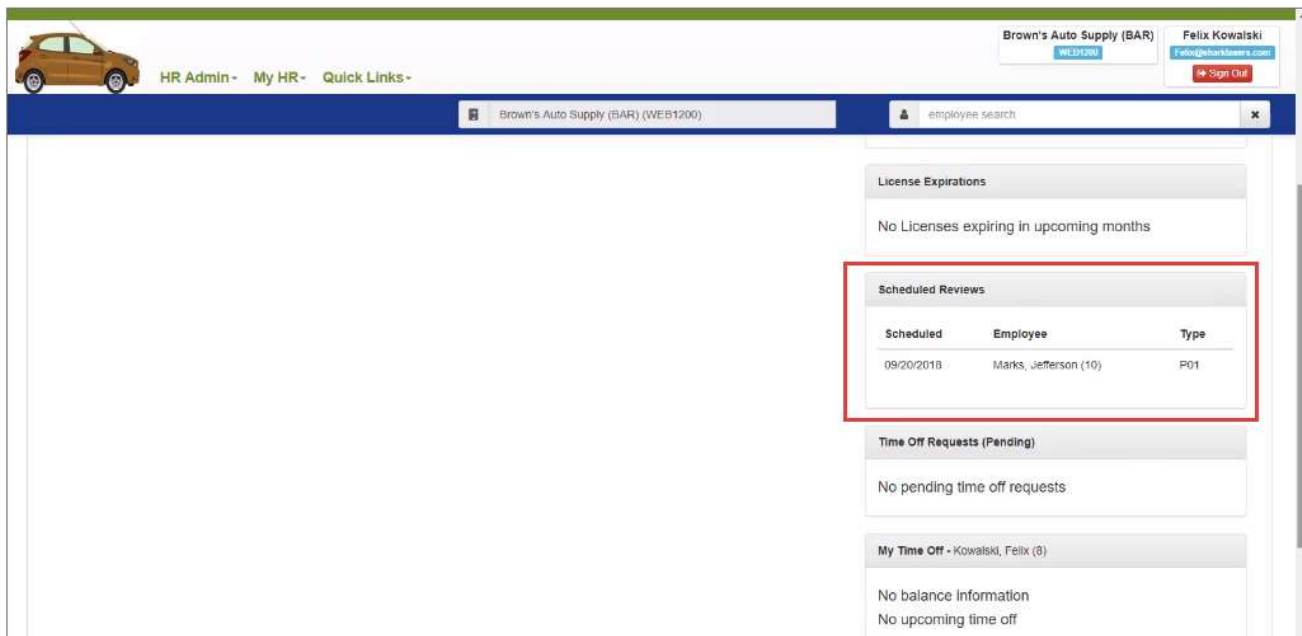
2. The system displays their **Reviews** dashboard.



The employee's Review dashboard will display any of the employee's reviews: past, present, or future that are linked to this employee.

Manager/Reviewer View of the Review

The Manager/Reviewer can see any of their scheduled reviews from their company **Dashboard**, in the **Scheduled Reviews** section.



Managers/Reviewers can also see their scheduled reviews by going to the **HR Admin – Employee Maintenance – Reviews** screen.

Reviews

+ NEW

Actions	Name	Employee ID	Reviewer	Scheduled Date	Status	Review Type
<input type="button" value="EDIT"/>	Jones, Edward	4	Brown, Stephen	10/11/2018	Scheduled	Annual Review
<input type="button" value="EDIT"/>	Jones, Edward	4	Brown, Stephen	09/26/2018	Scheduled	Annual Review
<input type="button" value="EDIT"/>	Brown, Stephen	2	Baker, Tammy	02/07/2019	Scheduled	Annual Review
<input type="button" value="EDIT"/>	Brown, Stephen	2	Mitchell, Rob	09/02/2019	Scheduled	Annual Review
<input type="button" value="EDIT"/>	Marley, Tyson	9	Garcia, Monique	06/29/2018	Scheduled	30 day
<input type="button" value="EDIT"/>	Garcia, Monique	6	Brown, Stephen	06/22/2018	Scheduled	Annual Review
<input type="button" value="EDIT"/>	Marks, Jefferson	10	Kowalski, Felix	09/20/2018	Scheduled	Promotional Review

Page: 1 of 1 GO Page size: 7 CHANGE Item 1 to 7 of 7

The **Reviews** dashboard will list all their reviews and they can display additional details about the review.

Reporting on Reviews

Admins can get Standard Reports concerning Reviews and they can also create a custom review report.

To run the Standard Review report:

1. Go to **HR Admin – Reporting – Standard Reports**.
2. The system displays the **Standard Reports** screen.
3. Scroll down to the **Review Types Report** row.



4. Click on the green Execute Report button on the **Review Types List Report** row.
5. The system displays the **Set Report Properties** screen.
6. Make sure the Company is selected, then click the **Execute Report** button at the bottom of the screen.
7. The system displays the Review Types report in a separate window, listing all of the Review Types that have been created.

Review Types			
Brown's Auto Supply (BAR)			
Priority	Code	Description	Active
	01	Annual Review	True
	1	90 day	True
	P01	Promotional Review	True
1	01	30 day	True

Creating a Custom Review Report

To create a custom Reviews report:

1. Go to **HR Admin – Reporting – Quick Report Writer (QRW)**.
2. The system displays the **Quick Report Writer (QRW)** screen.

Quick Report Writer (QRW)

Setup
Choose a report concept, select fields, and assign any other options and then click to generate the report.

Choose Report (Existing OR New Concept)

Existing Saved Report
Please Choose (Represents BLANK) Report Concept*
Reviews - CONCEPT

Unselected Fields

Q find field

Field Name	
First Name	➔
Last Name	➔
Email Acknowledged	➔
Review Code	➔
Review Status Code	➔
First Reviewer Display Name	➔
First Reviewer Employee Code	➔
First Reviewer Completed Date	➔
First Reviewer Rating	➔

Selected Fields

Q find field

Field Name	
Company Name	🗑
Company Code	🗑
Display Name	🗑
Employee ID	🗑
Review Description	🗑
Review Status Description	🗑
First Reviewer Scheduled Date	🗑

3. In the **Report Concept** dropdown, select the **Review Concept**. The system then displays a list of Review related