THE UNIVERSITY *of* EDINBURGH

System User Guide

How to Record your Annual Review for Employees

We realise this formatting may not be accessible for all – to request this document in an alternative format please email hrhelpline@ed.ac.uk.

Contents

Introduction

This guide covers key tasks for **Employees** in the '**How to Record Your Annual Review'** system process.

As part of the University's Annual Review process, there needs to be a record in People and Money of the Annual Review conversation having taken place.

Before you begin…

- All employees should have the opportunity to have appropriate discussions about their objectives, performance, and development. You should familiarise yourself with the annual review information available on the Annual Review pages of the Conversations Hub SharePoint site.
- All employees have access to the Annual Review Record app in People and Money. Annual review completion should be recorded when you have held your review meeting with your line manager/reviewer, and this has been signed off within the school or department. Your line manager can also record this on your behalf. If your annual review was held with a reviewer who is not your line manager, only you or your line manager can record the completion in People and Money.
- Associated paperwork should continue to be filed as per local arrangements.
- Employees who are within their probation period and/or started after 01 August of the current review year are not required to have an annual review recorded in People and Money. For employees that this applies to, they will not have a review period for the current year within the Annual Review app. For future annual review years, they will be able to record annual review completion.

Recording Non-Completion of Annual Review

There are circumstances when an annual review meeting might not take place, as per below. If you fall into one of these scenarios, your manager can record this within the system. Alternatively, you can record this as outlined in Step 8 below.

- Low Hours staff – working less than 0.2 FTE (working less than 7 hours per week)
- Absent from work during review meeting schedule (e.g., adoption, surrogacy, maternity leave, parental leave, illness, special leave, etc.)
- Clinical Academics at Consultant Level or in a recognised training programme
- Guaranteed Hours Staff
- Employees who start after 1 August in the current year or are still within their probation period
- Employee has resigned

In Brief

This section is a **simple overview** and should be used as a reminder. More detailed information, screenshots and tips are provided within the 'In Detail' section.

Record your Annual Review

1. From the People and Money homepage, within the **Me** tab, select the **Annual Review Record** app.
2. Click on **+ Add**.
3. Select **Template,** then select Annual Review Completion Record from the drop-down list.
4. Enter the **date** of the meeting.
5. Click on the **Schedule** button. You will be returned to the list of Check-ins, where the new Check-in item will show.
6. **Select the relevant new item** to open the details screen.
7. **Select the relevant questionnaire drop-down** for yourself, then select **View Questionnaire**.
8. **Questionnaire**: Complete the answers to the three questions within the questionnaire, then **click Save**. Note if you selected 'No' to Q1, this will allow you to record the non-completion reason.
9. Select **Mark as done**.
10. Select **Update**.

Review a Past Annual Review Record

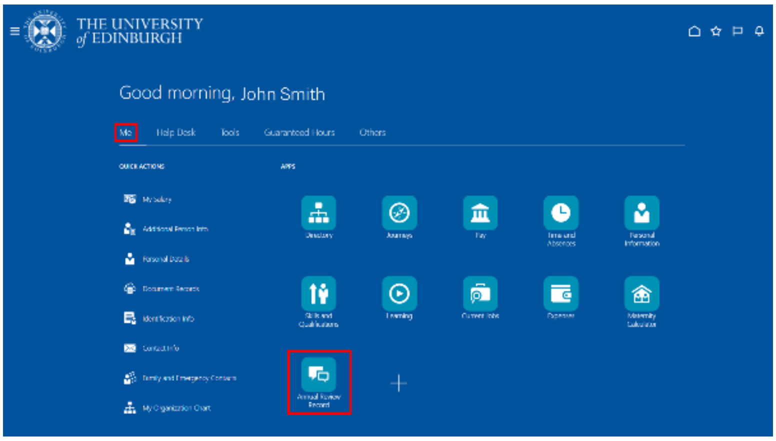
1. From the People and Money homepage, within the **Me** tab, select the **Annual Review Record** app.
2. In the next screen, you will see a **list of past Annual Review Records**, named "Annual Review Completion Record".
3. **Select** a previous completion for a past period to view the record; this is for viewing purposes only.

In Detail

This section provides the detailed steps and includes relevant screenshots from the system.

Record your Annual Review

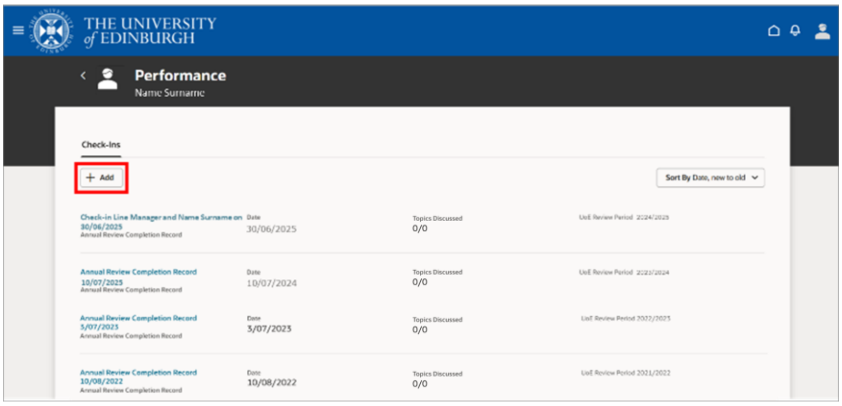
1. From the People and Money homepage, within the **Me** tab, select the **Annual Review Record** app.



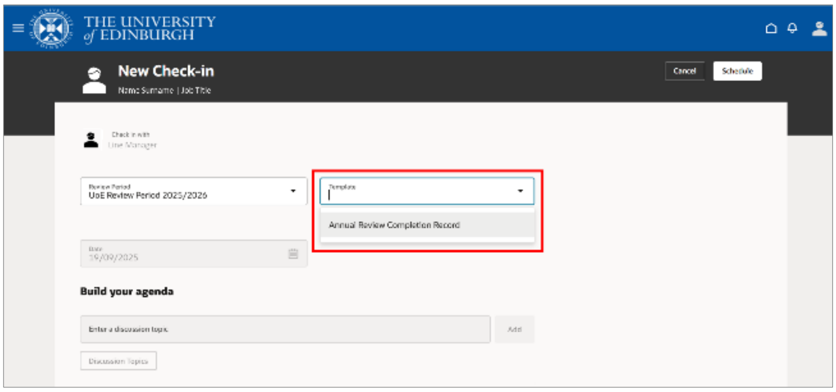
On the next screen, you will see a list of past Annual Review Records, named "Annual Review Completion Record". In the list, new records are called "Check-ins".

Note: Please ignore the column showing entries for "Topics Discussed", which are inactive and greyed out; within UoE we are not using this functionality.

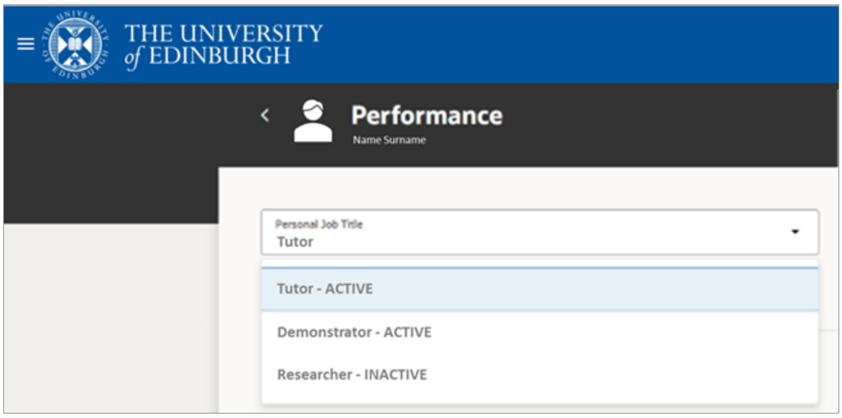
2. Click on **+ Add**.



3. Select **Template**, then select **Annual Review Completion Record** from the drop-down list.

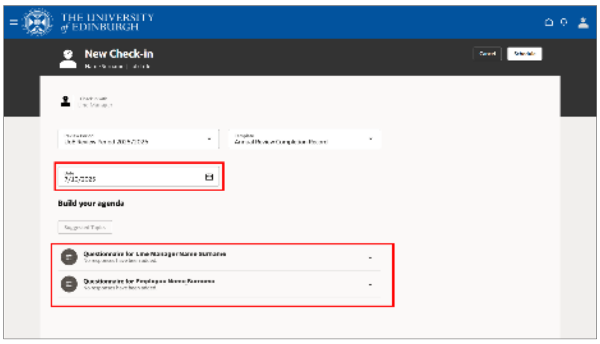


Note: If you hold more than one assignment, please select the assignment you wish to record your annual review against, from the job title drop-down that will be shown above 'Review Period'.



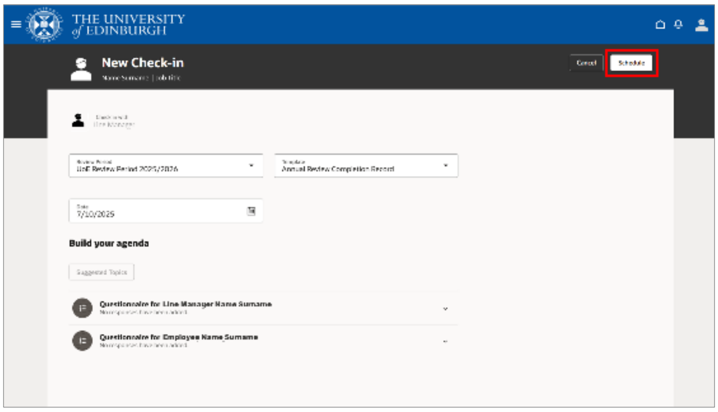
4. Enter the **date** of the meeting.

Note: The questionnaires are now revealed but are in a view-only state and not active until Schedule is selected, and step 5 is completed.

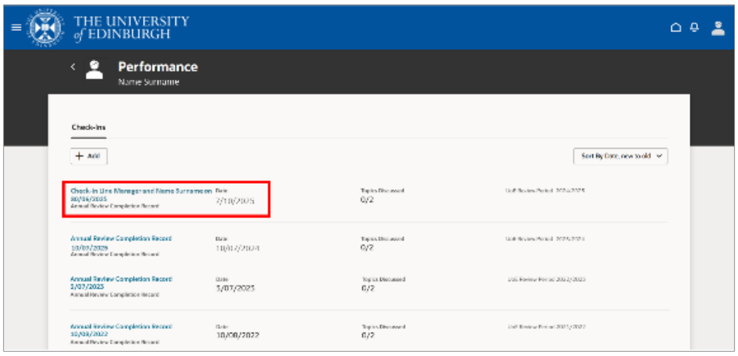


Note: Please ignore the text relating to “Agenda” or “Build your agenda”, which is inactive and greyed out; within UoE we are not using this functionality.

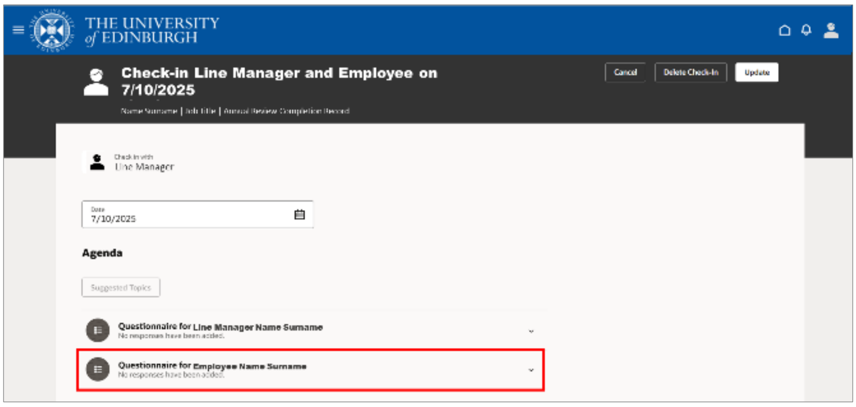
5. Click on the **Schedule** button top right.



You will be returned to the list of Check-ins, where the new Check-in item will show.



6. **Select the relevant new Check-in item** to open the details screen.

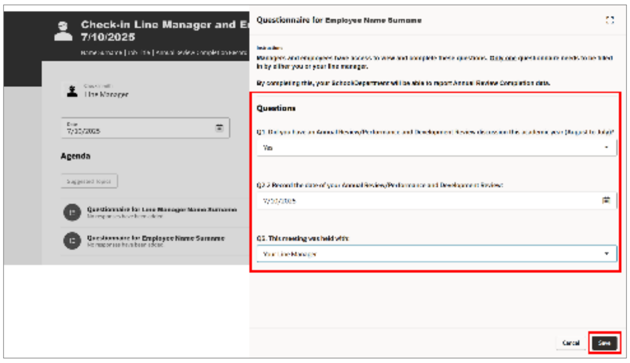


Note:

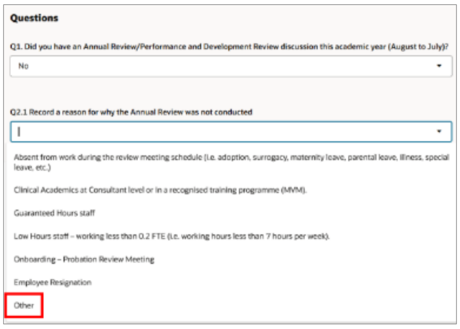
- You can see the other party's questionnaire at any time, whether blank or completed but you cannot interact with it.
- Please ignore the “Agenda” and “Discussion Topics” sections, which is greyed out and cannot be edited - within UoE we are not using this functionality.

7. **Select the relevant questionnaire drop-down** for yourself, then select **View Questionnaire**.

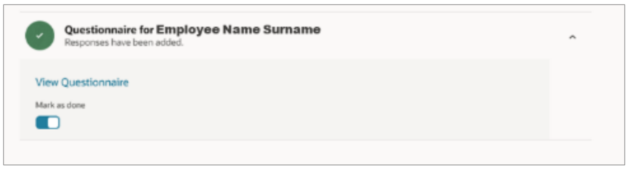
8. **Questionnaire**: Complete the answers to the three questions within the questionnaire, then **click Save** bottom right.



Note: If you select ‘No’ to Q1, this will allow you to record the non-completion reason. If you select the reason as ‘Other’, a free-text box is provided; please do not include any personal details.



9. Select the **Mark as done** toggle. You will notice the icon next to the Questionnaire turning to a green tick to show completion.

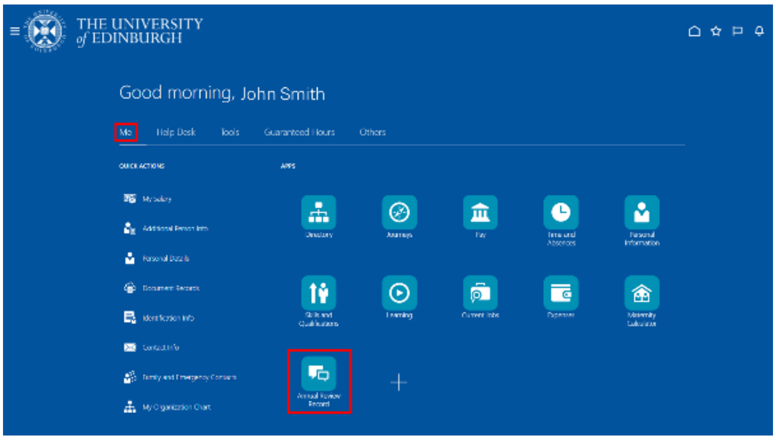


10. Select **Update** at the top right of the screen.

Note: It is essential to select both **Mark as done** and **Update** to complete the process to make the data available in reporting.

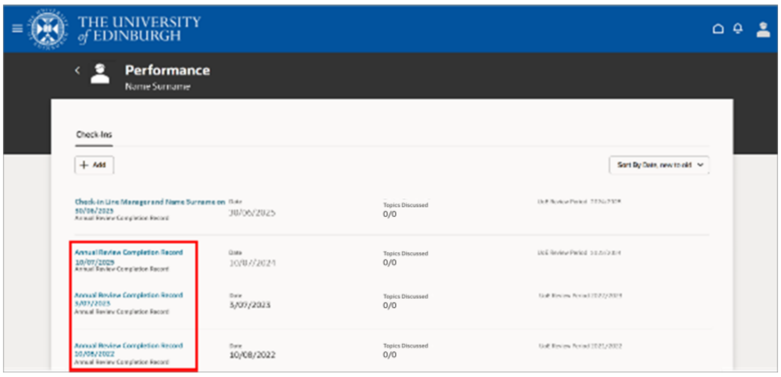
Review a Past Annual Review Record

1. From the People and Money homepage, within the **Me** tab, select the **Annual Review Record** app.

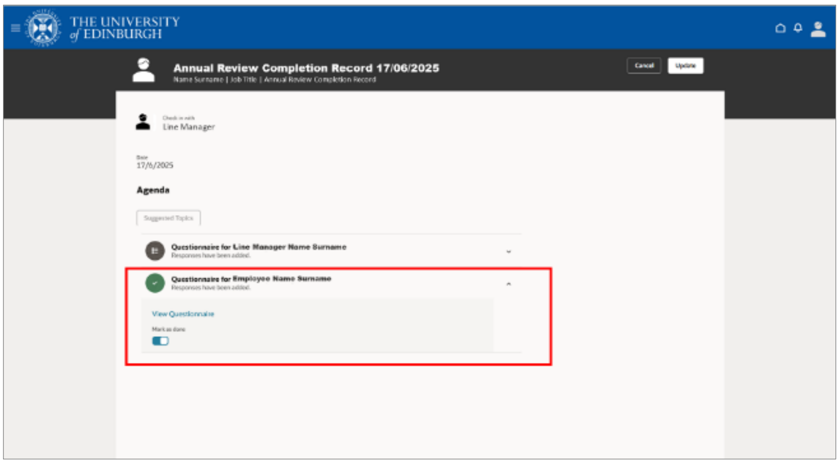


2. In the next screen, you will see a **list of past Annual Review Records**, named "Annual Review Completion Record", with dates besides these.

Note: As already mentioned, please ignore the column showing entries for "Topics Discussed"; within UoE we are not using this functionality.



3. **Select** a previous completion for a past period to open the record; this is for viewing purposes only. You should not make any edits to previous records unless they are incorrect.



Common Errors

- Recording of Annual Review conversations must be done in the People and Money system by the end of August for the review year in question. If it is done after that, you will incorrectly create an annual review record for the following review year and can only be corrected by raising a Service Request with HR Helpline.

Other points to note

- The person who completed the questionnaire is the only person who can delete a Check In/Annual Review Completion record; therefore, your manager will not be able to delete this if it was created by you and you will not have access to delete if it was created by your manager.
- However, it is recommended that you **do not delete** any annual review records for previous review periods, to avoid any impact on reporting. Please note there will be no ‘Are you sure’ warning message should you decide to delete it.

- If necessary, the person who created a previous annual review record, can edit it.
- It is possible to create two entries for the same Annual Review period, albeit not on the same date. However, it is current UoE process to only do one annual review meeting per year and therefore there should only be one annual review record in the People and Money system.
- Likewise, it is technically possible for both the line manager and the employee to complete a questionnaire for the same year but as the annual review conversation only needs to be recorded once, this is not recommended. This does not impact reporting as it is only captured as one record.
- It is common practice for the employee to record their annual review conversation in the system.
- You currently cannot use the Back button from the "Performance" screen to return to previous screens. Please use the Home button to exit the screen.
- Please note that local staffing teams cannot record annual reviews in People and Money. This is not possible because the recording of Annual Reviews is predicated on the line manager/direct report relationship.

Version History

Version	Date	Description	Approved By
0.1			
1.0			ME
2.0			SK
3.0			SK
4.0	Oct 2025	Updated to Redwood Template and changes for 25C.	ME
5.0	Jan 2026	Updated to reflect changes from 25D.	SS

Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.