System User Guide

How to Record an Annual Review for Line Managers

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Contents

Introduction

This guide covers key tasks for **Line Managers** 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. Further information about Annual Reviews, including when an annual review is not required, can be found in the [Annual Review pages](#) of the [Conversations Hub SharePoint site](#).

- Annual review completion should be recorded when you have held your review meeting, and this has been signed off within the school or department. Employees should be encouraged to log this themselves, but line managers can do this on their behalf. This only needs to be recorded once by either the employee or the manager. If an annual review was held with a reviewer who is not the line manager within People and Money, this must be recorded by the employee or the line manager.

- Associated paperwork should continue to be filed as per local arrangements.

- User Guidance for recording annual reviews for employees is available under the heading Annual Review within the [People and Money User Guides](#) webpage.

Recording Non-Completion of Annual Review

There are circumstances when an annual review meeting might not take place, as per below. If your direct report falls into one of these scenarios, you as their line manager can record this within the system. Alternatively, the employee can record this as outlined in Step 9 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

Reports

Reports are available in the system in the 'Annual Review Dashboard' App. Please see the [Guide to Annual Review Reporting Dashboard](#) for further information.

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.
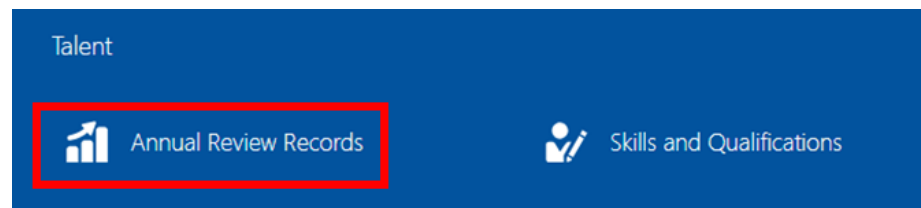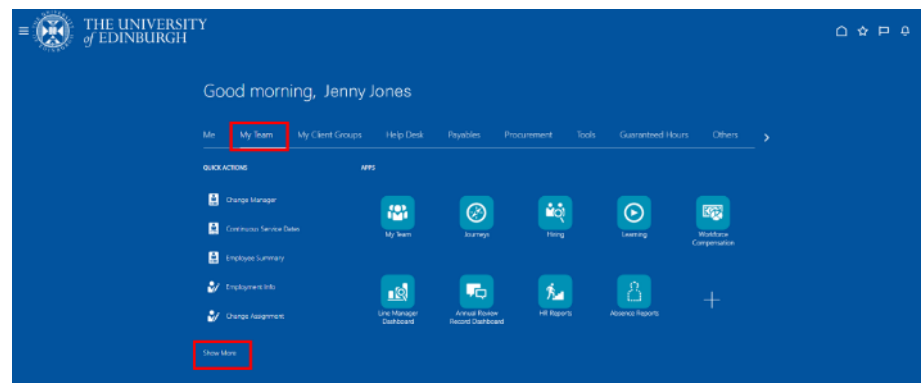
Record an Annual Review for an employee

1. From the People and Money homepage, click on the **My Team** tab, then click on **Show More**, scroll to **Talent** and click on the **Annual Review Records** app.
2. Select the employee you wish to record the annual review for, by **clicking on their blue hyperlinked name**.
3. In the screen with the list of previous Annual Review Records, click on **+ Add** to start creating a new record.
4. Select **Template,** then select Annual Review Completion Record from the drop-down list.
5. Enter the **date** of the meeting.
6. 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.
7. **Select the relevant new Check-in item** to open the details screen.
8. **Select the relevant questionnaire drop-down** for yourself, then select **View Questionnaire**.
9. Complete the answers to the three questions within the **questionnaire**, then **click Save**.
10. Select the **Mark as done** toggle.
11. Select **Update**. It is essential to select both **Mark as done** and **Update** to complete the process and make the data available in reporting.

Review a Past Annual Review Record

1. From the People and Money homepage, click on the **My Team** tab, then click on **Show More**, scroll to **Talent** and click on the **Annual Review Records** app.
2. Select the employee you wish to record the annual review for, **by clicking on their blue hyperlinked name**.
3. In the next screen, you will see a **list of past Annual Review Records**, named "Annual Review Completion Record", with dates besides these.
4. **Select** a previous completion for a past period to open the record; this is for viewing purposes only.
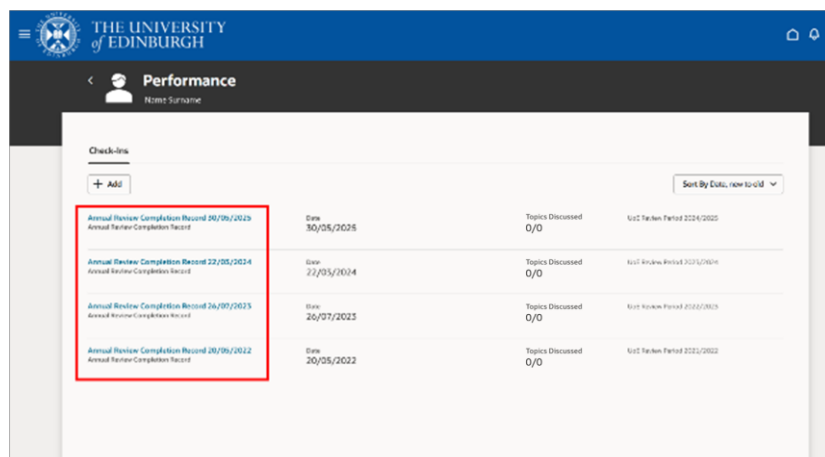
In Detail

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

Record an Annual Review for an employee

1. From the People and Money homepage, click on the **My Team** tab, then click on **Show More**, scroll to **Talent** and click on the **Annual Review Records** app.

2. Select the employee you wish to record the annual review for, by **clicking on their blue hyperlinked name**. If required, select the appropriate assignment.
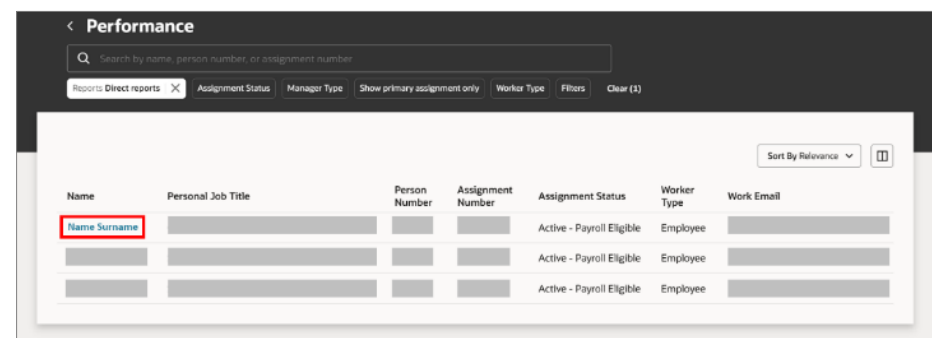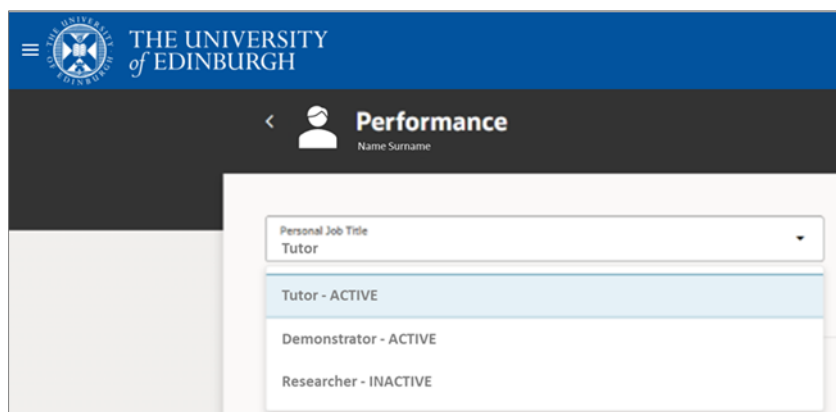
On the next screen, you will see a list of past Annual Review Records, named "Annual Review Completion Record". In the list, new records are called "Check-Ins".

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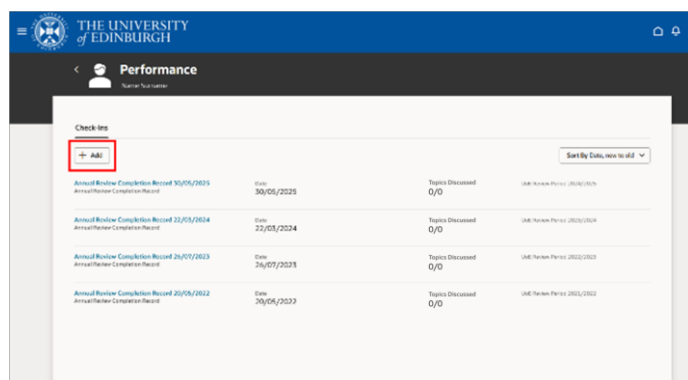

Note: This is context sensitive: If the employee has held previous roles, those will be listed here as Inactive assignments, regardless of who the past manager was. Please take care to select the correct Active role you wish to record the annual review completion for.
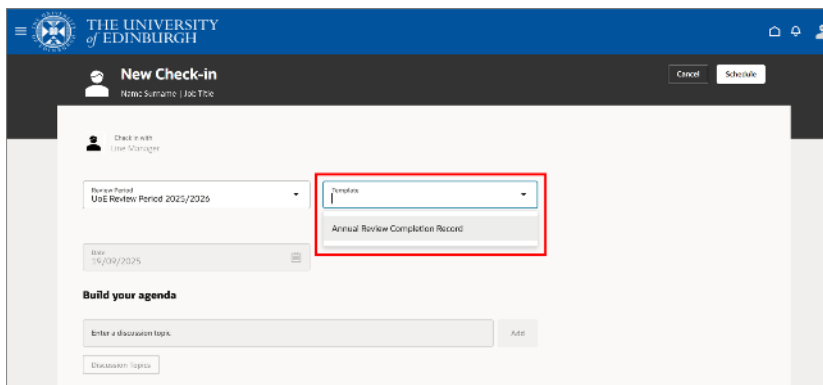

3. Click on **+ Add** to start creating a new record.

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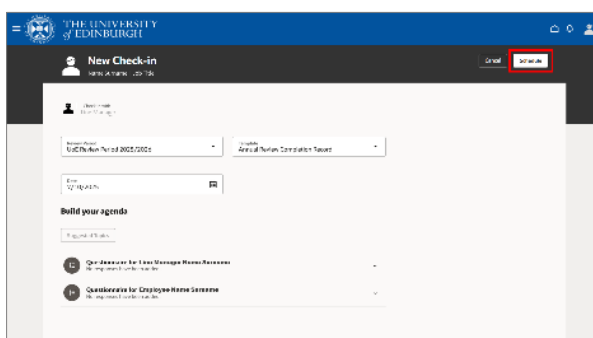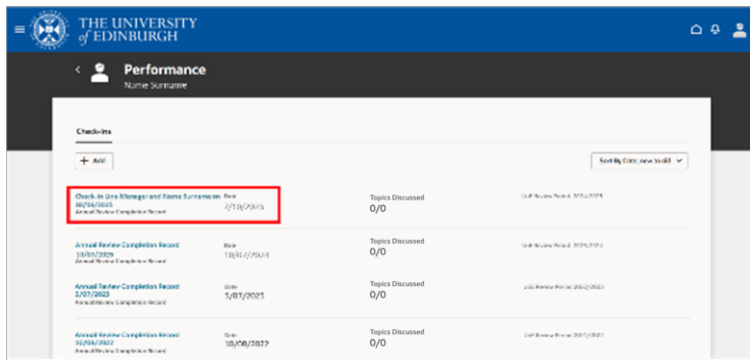

5. Enter the **date** of the meeting.

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

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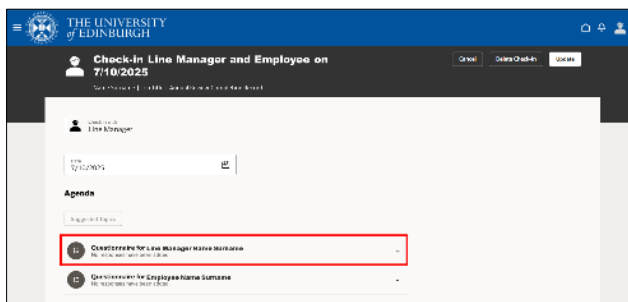
7. **Select the relevant new Check-in item** to open the details screen.

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" section, which is greyed out and cannot be edited - within UoE we are not using this functionality.

8. **Select the relevant questionnaire drop-down** for yourself, then **View Questionnaire**.
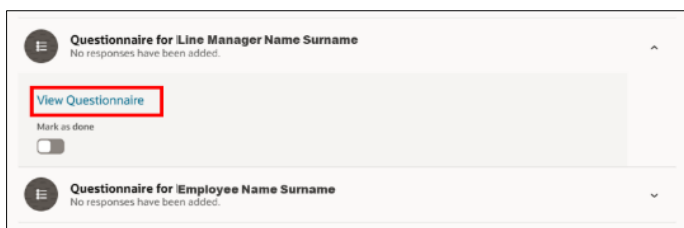
9. **Questionnaire**: Complete the answers to the three questions within the questionnaire, then **click Save**.

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.

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

11. 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 and make the data available in reporting.

Review a Past Annual Review Record

1. From the People and Money homepage, click on the **My Team** tab, then click on **Show More**, scroll to **Talent** and click on the **Annual Review Records** app.
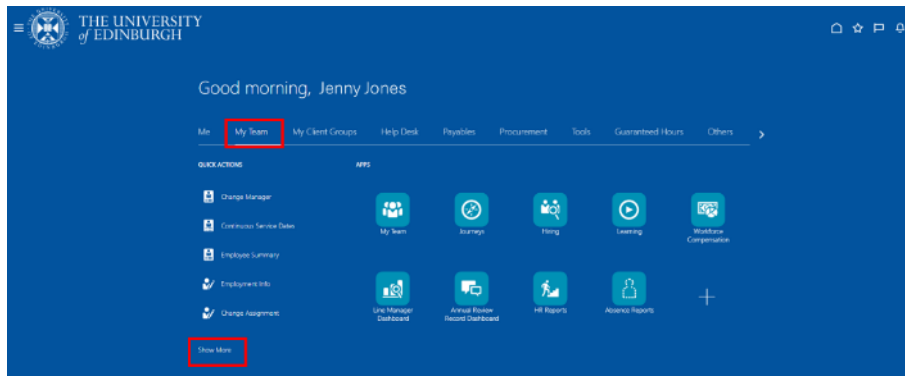
2. Select the employee you wish to view the annual review for, **by clicking on their blue hyperlinked name**. If required, select the appropriate assignment.

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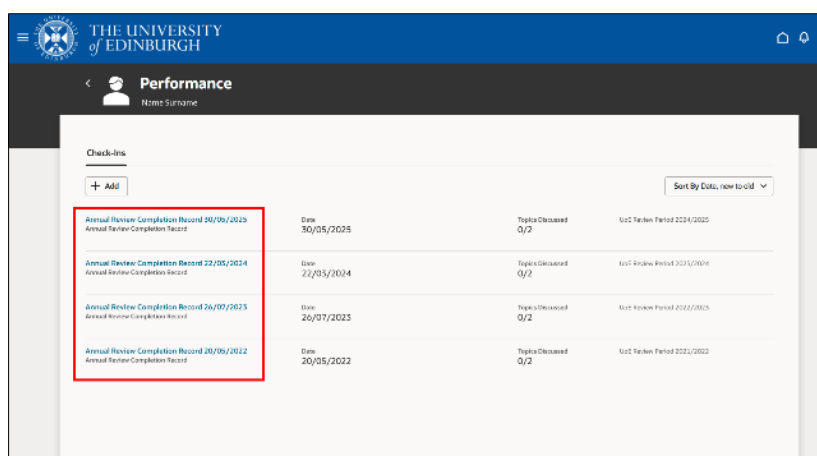
4. **Click** on a previous completion for a past period to open the record; this is for viewing purposes only. You should not make any edits to previous records unless they are incorrect.
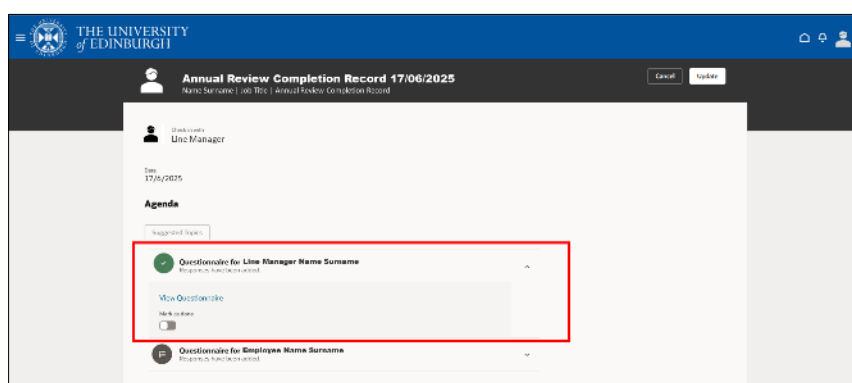
Common Errors

- 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 direct report 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 direct report.
- 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.
- In the screen displaying the list of direct reports, managers of managers can view data from the reporting line by removing the Direct Reports filter.
- Managers of managers can schedule a check-in between a manager in their hierarchy and the direct report but cannot engage with the Manager questionnaire – they need to ask the employee to complete this.
- Managers of managers can select "Mark as done" on their indirect report's manager questionnaire, however this should **not** be used because it does not push data to the Dashboard reports.
- 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.
- You currently cannot use the Back button from "Performance" screen, to return to previous screens. Please use the Home button to exit the screen.

Version History

Version	Date	Description	Approved By
0.1			
1.0			ME
2.0			SK
3.0			SK
4.0			ME
5.0	Oct 2025	Updated to Redwood Template and changes for 25C.	ME
6.0	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.