THE UNIVERSITY of EDINBURGH

# People and Money system

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## PM 3723 -How to Record your Annual Review for Employees

**Before you start….**

- 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 HR Webpages here.
- All employees will have access to the Annual Review Record app depending on the system security role. 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.

**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 4 below.

- 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
- Low Hours staff – working less than 0.2 FTE (working less than 7 hours per week)
- Employees who start after 1st August in the current year or are still within their probation period
- Employee has resigned

## In Brief…

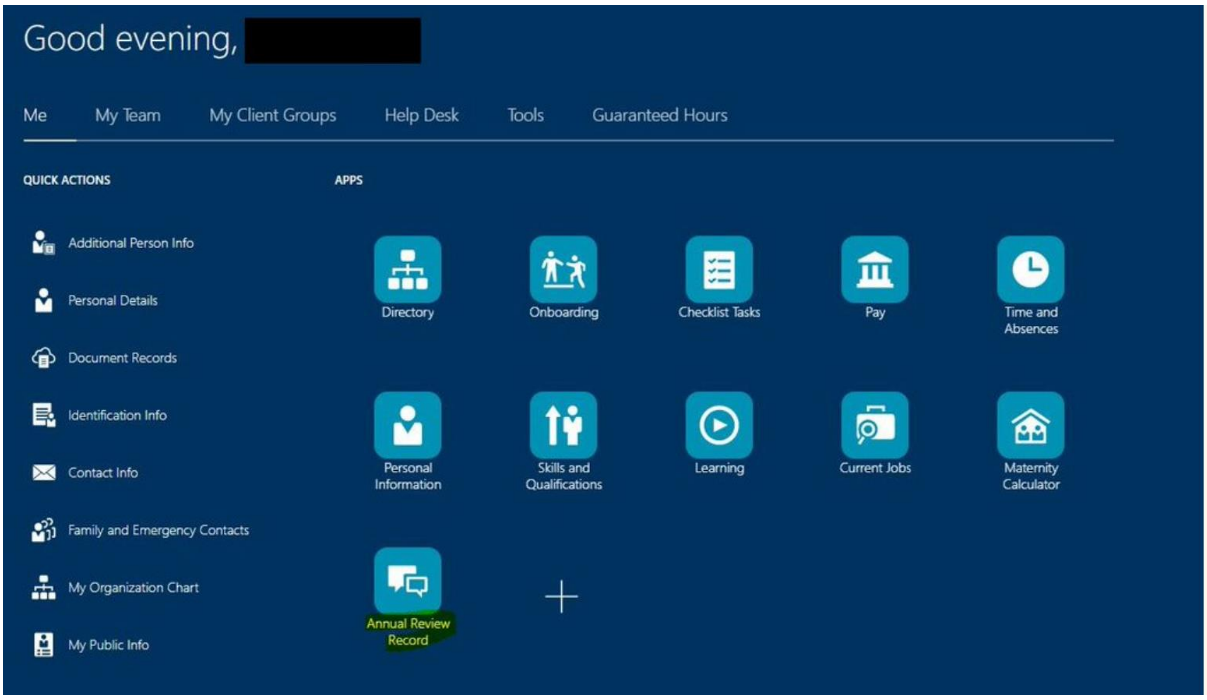
This is a simple overview of the process.

1. Log into People and Money>Me>Annual Review Record
2. Select the review Period (of current Annual review year) and click Add
3. Details Section – check any pre-populated details are correct and add the date that your annual review was held
4. 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.

For detailed guidance, see the next section.

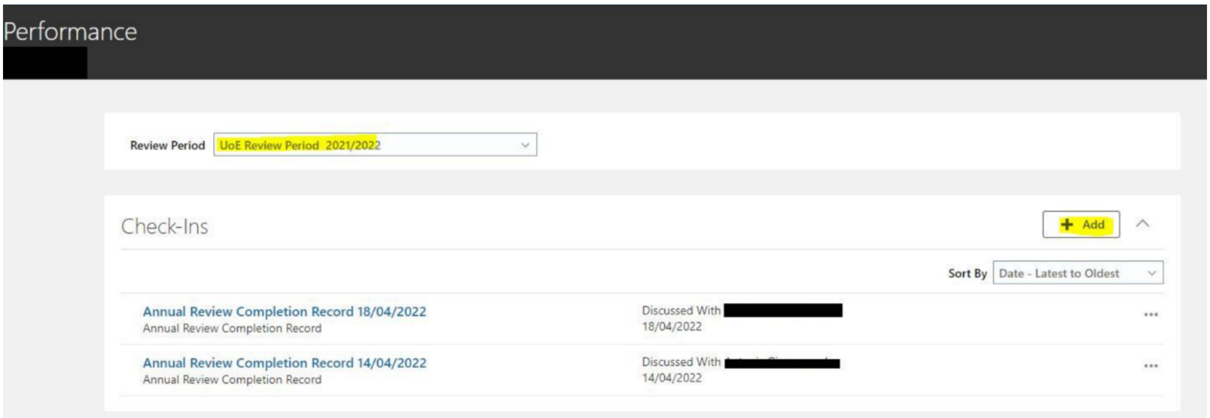
## In Detail…

1. Log into People and Money>Me>Annual Review Record



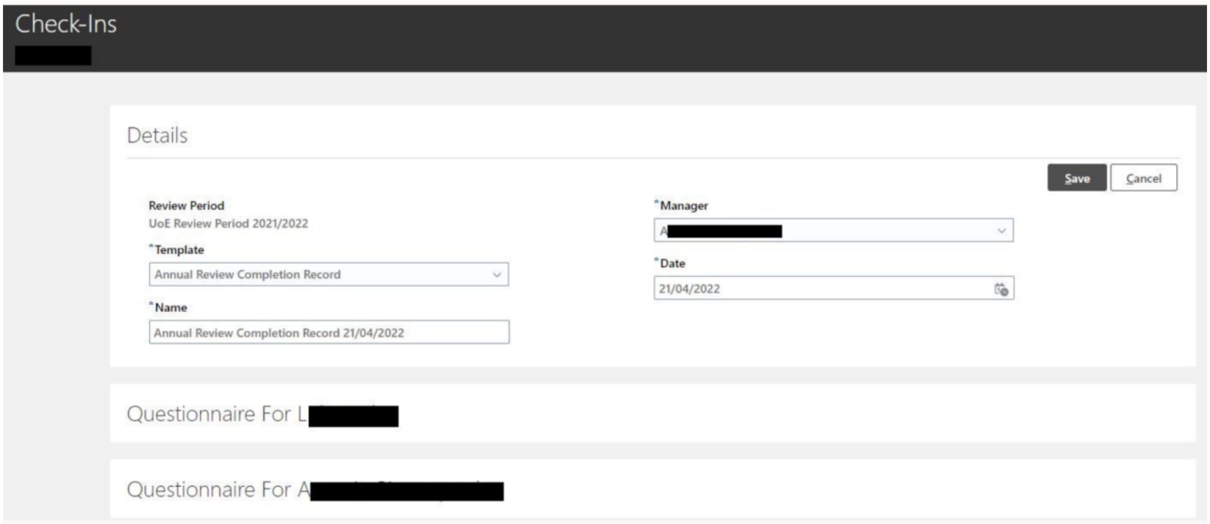
2. Select the review Period (of the current Annual review year), then **click Add.**

Note if you hold more than one assignment, please select the assignment you wish to record your annual review against in the drop-down above ‘review period’.



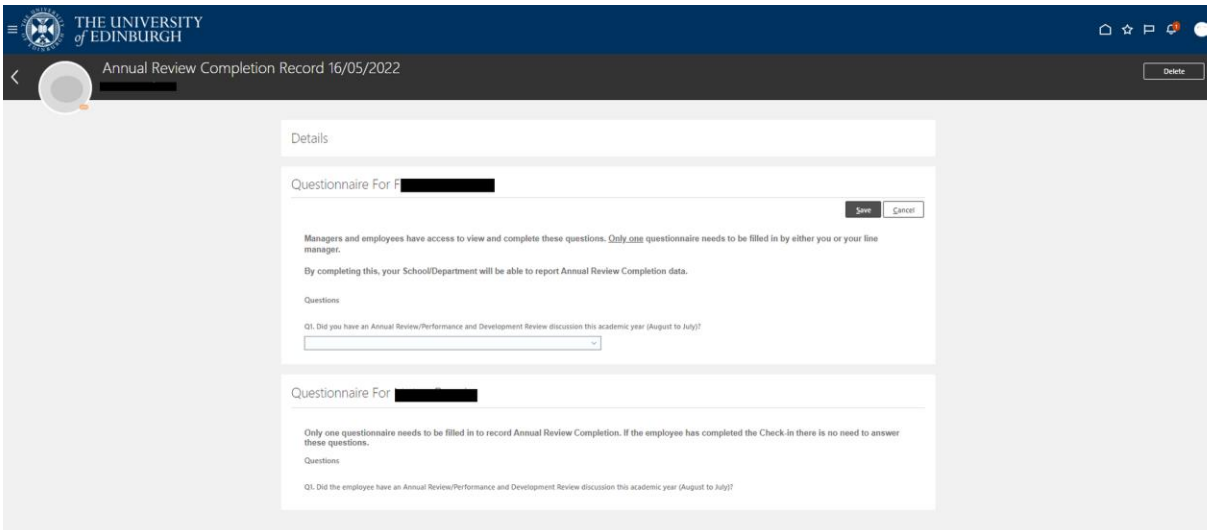

3. Details Section – check and update the following fields

- **Template** should be ‘Annual Review Completion Record’
- **Name** – title this ‘Annual review Completion record and date of meeting, for example Annual Review Completion record 21/04/2022.
- **Manager** – this should be your Line Manager name, even if the reviewer was someone else.
- **Date** – Use either the date of the annual review meeting or for situations where non completion of annual review is being recorded this field records the date the record is made.
- **Click Save**

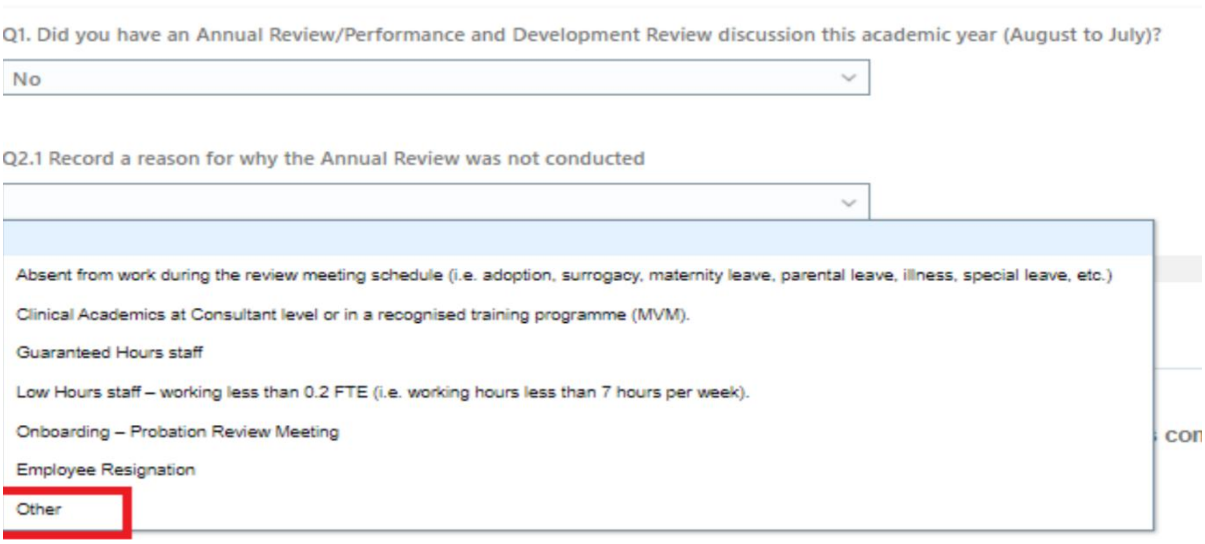



4. Questionnaire

Select **Edit** to complete the answers to the three questions within the questionnaire **then click Save.** This will complete the process of recording your annual review completion for the current academic year.



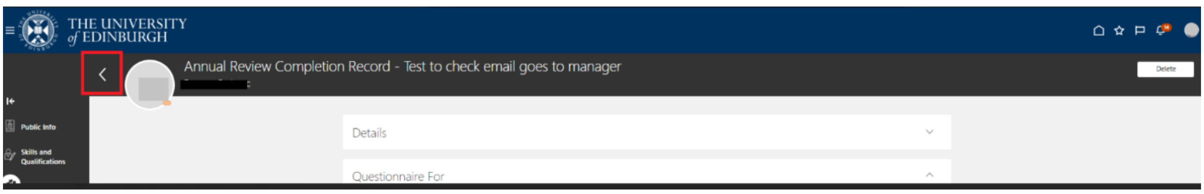

**Note** If you answer ‘No’ to Question 1 in this step, this will display the following screen, and can be used for recording the following non completion reasons:




If using the reason ‘Other’ a free text box is provided, please do not include any personal details.

**Click Save.**

**To exit the page,** you should click on ‘back arrow’ button at the top of the page.



**Other points to note**

- If you start to create an annual review record, complete, or delete this your manager will receive a system notification via email and on the bell notification icon.

- 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.