



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. Further information about Annual Reviews, including when an annual review is not required, can be found in the Conversations Hub on the [Annual Reviews tab](#).
- All employees can record their annual review status 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.

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)
- Employee within probation period
- Employee has resigned

In Brief...

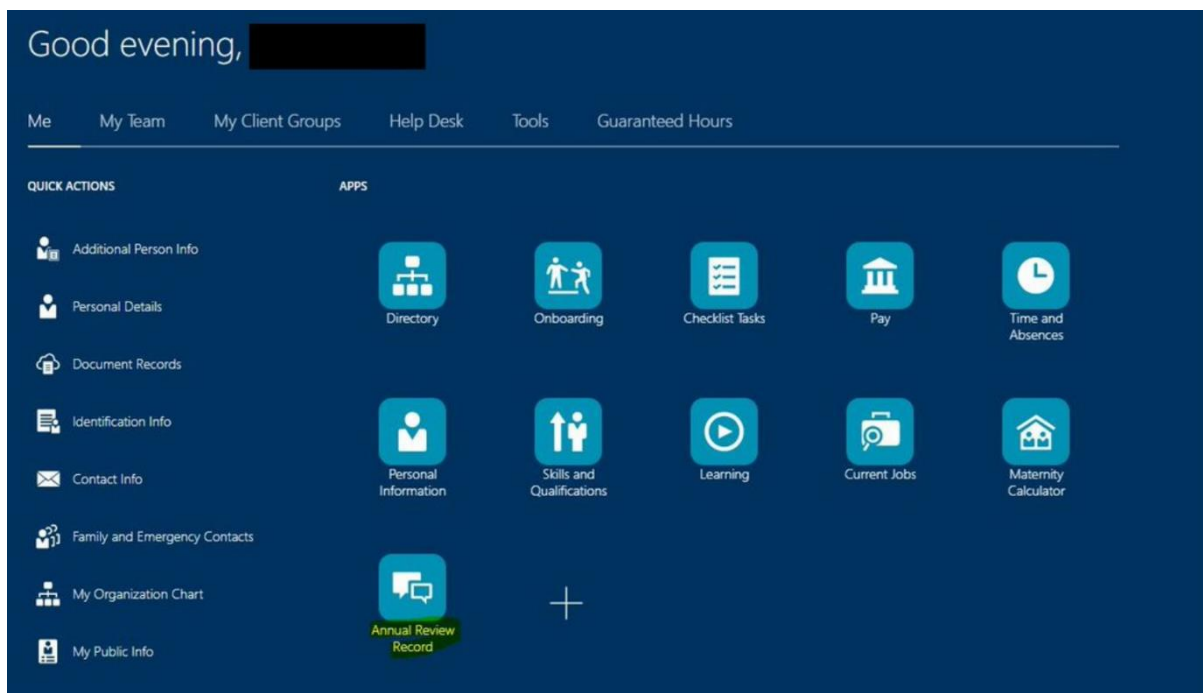
This is a simple overview of the process.

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

The screenshot shows the 'Performance' section of a system. At the top, there is a 'Review Period' dropdown menu currently set to 'UoE Review Period: 2021/2022'. Below this is a 'Check-Ins' section with an '+ Add' button and a 'Sort By' dropdown set to 'Date - Latest to Oldest'. A table lists two check-in records:

Check-In Title	Date	Discussed With
Annual Review Completion Record 18/04/2022	18/04/2022	[Redacted]
Annual Review Completion Record 14/04/2022	14/04/2022	[Redacted]

3. Complete the Check-in

In the 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**

The screenshot shows the 'Check-Ins' details form. The 'Details' section contains the following fields:

- Review Period:** UoE Review Period 2021/2022
- *Template:** Annual Review Completion Record
- *Name:** Annual Review Completion Record 21/04/2022
- *Manager:** [Redacted]
- *Date:** 21/04/2022

At the bottom of the form, there are two sections for 'Questionnaire For L [Redacted]' and 'Questionnaire For A [Redacted]'. 'Save' and 'Cancel' buttons are located at the top right of the details section.

4. Complete the 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 check-in for the current academic year. Note you must complete both the check-in and questionnaire.

The screenshot shows the 'Annual Review Completion Record' for 16/05/2022. It features two questionnaire forms. The first form, titled 'Questionnaire For [redacted]', includes a 'Save' button and a 'Cancel' button. Below the buttons, it states: 'Managers and employees have access to view and complete these questions. Only one questionnaire needs to be filled in by either you or your line manager. By completing this, your School/Department will be able to report Annual Review Completion data.' It then asks 'Q1 Did you have an Annual Review/Performance and Development Review discussion this academic year (August to July)?' with a dropdown menu. The second form, also titled 'Questionnaire For [redacted]', includes a note: 'Only one questionnaire needs to be filled in to record Annual Review Completion. If the employee has completed the Check-in there is no need to answer these questions.' and asks 'Q1 Did the employee have an Annual Review/Performance and Development Review discussion this academic year (August to July)?' with a dropdown menu.

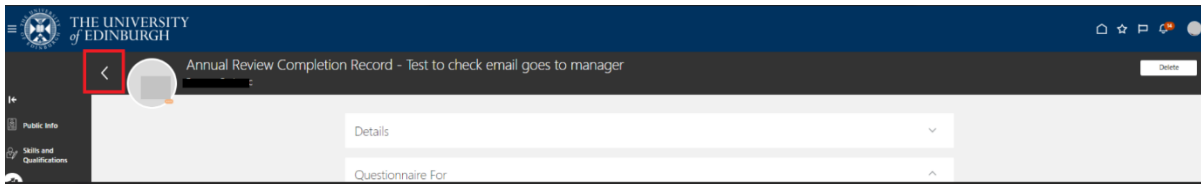
Note If you answer 'No' to Question 1 in this step, this will display the following screen, and can be used for recording the following non completion reasons:

The screenshot shows the 'No' response for Question 1: 'Q1. Did you have an Annual Review/Performance and Development Review discussion this academic year (August to July)?'. Below the dropdown menu, there is a section for 'Q2.1 Record a reason for why the Annual Review was not conducted'. A dropdown menu is open, showing a list of reasons: 'Absent from work during the review meeting schedule (i.e. adoption, surrogacy, maternity leave, parental leave, illness, special leave, etc.)', 'Clinical Academics at Consultant level or in a recognised training programme (MVM)', 'Guaranteed Hours staff', 'Low Hours staff – working less than 0.2 FTE (i.e. working hours less than 7 hours per week)', 'Onboarding – Probation Review Meeting', 'Employee Resignation', and 'Other'. The 'Other' option is highlighted with a red box.

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.