



People and Money system

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

PM 3724 -How to Record an Annual Review for Line Managers

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](#).
- 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 [here](#).

Recording Non-Completion of Annual Review

There are circumstances when an annual review meeting might not take place as per below. Managers should update the record in the case of non-completion; however, the employee can also do this. See 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

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...

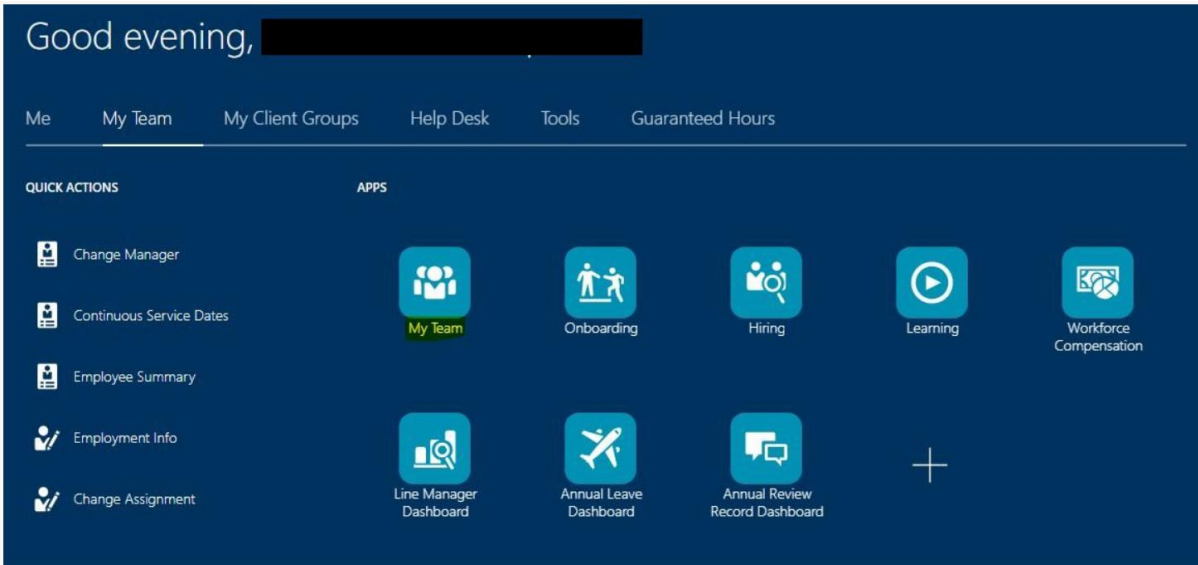
This is a simple overview of the process.

1. Log into People and Money>My Team
2. Select the Employee you wish to record the annual review for – if required select the appropriate assignment
3. From the Employment Info screen, navigate to the left hand side panel and click on 'Show More' (under Employment Info)
4. Click on Performance from the left-hand side navigation pane, select the Review Period (of current Annual review year), then click 'Add'
5. Complete the Check-in, Details Section – Check and update
6. Complete the Questionnaire – Select 'Edit' (for the manager questionnaire with your name)
7. Complete the answers to the three questions within the questionnaire and click 'Save'.

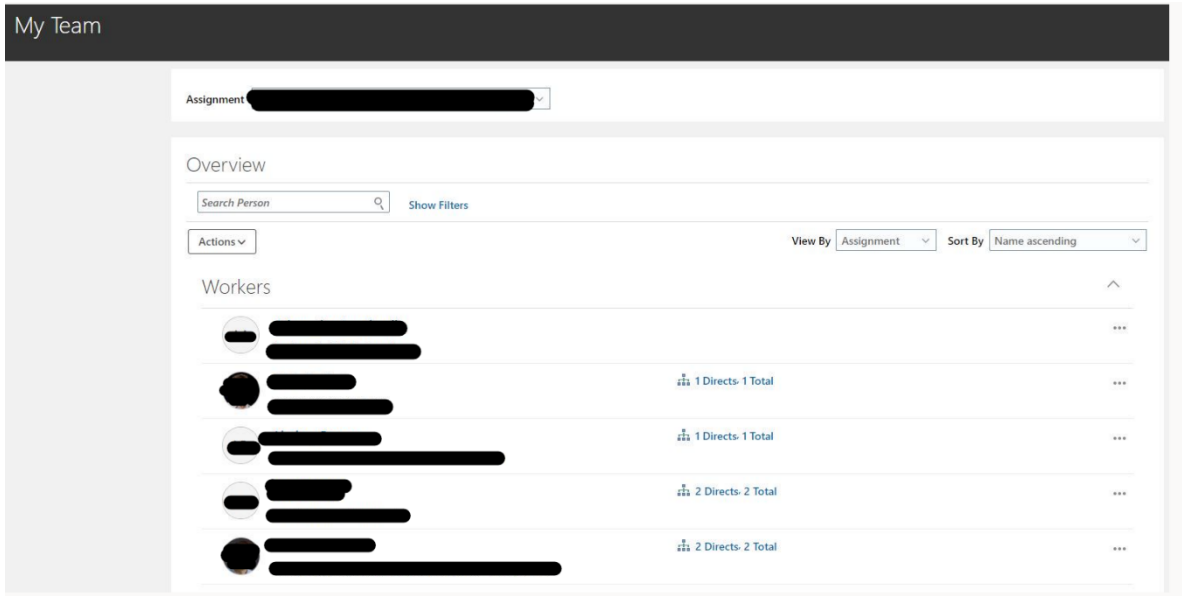
For detailed guidance, see the next section.

In Detail...

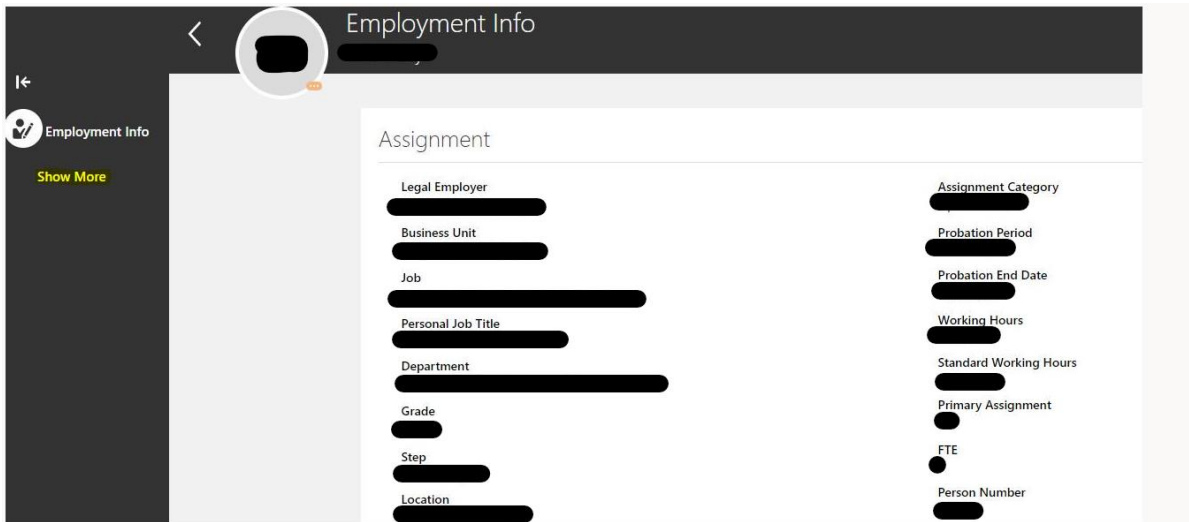
1. Log into People and Money>My Team



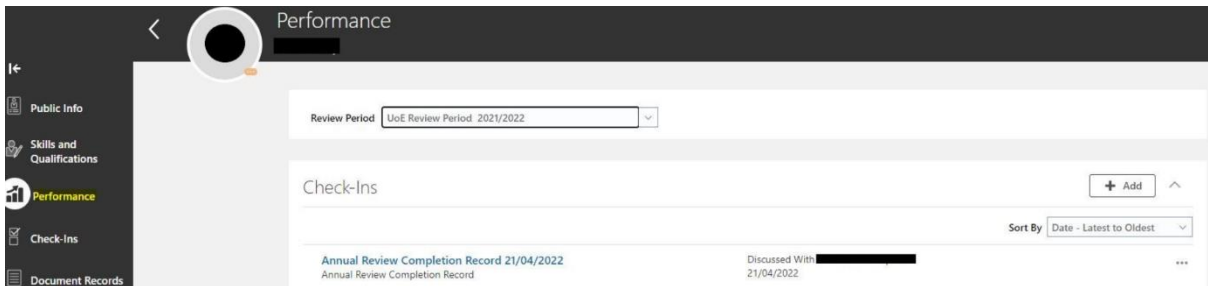
2. Select the employee from the list you wish to record the annual review against– if you are a line manager for more than one post, select the appropriate assignment to display the list of direct reports, then select the employee



3. From the Employment Info Screen, navigate to the left-hand side panel and click on 'Show More' (underneath Employment Info)



4. Select 'Performance' then select the Review Period (of current Annual review year) from the drop down, **then click Add**



5. 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 the 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**

Check-Ins

Details

Review Period
UoE Review Period 2021/2022

***Template**
Annual Review Completion Record

***Name**
Annual Review Completion Record 21/04/2022

***Manager**
A [REDACTED]

***Date**
21/04/2022

Questionnaire For L [REDACTED]

Questionnaire For A [REDACTED]

6. Complete the Questionnaire

Select 'Edit' for the Manager questionnaire (the one with your name)

Questionnaire For [REDACTED]

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.

Questions

Q1. Did the employee have an Annual Review/Performance and Development Review discussion this academic year (August to July)?

7. Complete the answers to the three questions within the questionnaire and click Save. Note you must complete both the check-in and questionnaire.

Questionnaire For [REDACTED]

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.

Questions

Q1. Did the employee have an Annual Review/Performance and Development Review discussion this academic year (August to July)?
Yes

Q2. Record the date of your Annual Review/Performance and Development Review:
20/04/2022

Q3. This meeting was held with:
Line Manager (you)

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:

Q1. Did you have an Annual Review/Performance and Development Review discussion this academic year (August to July)?

No

Q2.1 Record a reason for why the Annual Review was not conducted

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

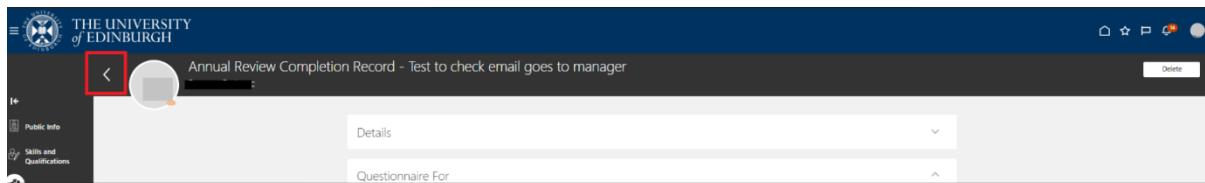
Employee Resignation

Other

If using '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 or when you complete this, the employee will not receive a notification. If you delete the record the employee 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, you will not be able to delete this if it was created by the employee.