



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 3725 – Annual Review Reporting Dashboard for Line Managers/SDA's and HR Partners

Before you start

Reports are available in the system in the 'Annual Review Dashboard' App.



The reports are available for line managers at department level (direct and indirect reports), SDAs at business unit level (within their area of responsibility) and HR at organisational level. If you are a Line Manager who also has SDA or HR Partner access the report will retrieve data for all employees within your area of responsibility.

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 can record their annual review completion in People and Money.

The reports have been built around historical reporting criteria. **It is important to note** that **only** employees that meet these criteria will appear on the reports and are referred to as 'eligible' employees.

Some of the reporting criteria are flexible, meaning the report user can influence this by selecting the date or the review period. Other criteria are built into the report design. These criteria are used for reporting purposes and do not impact whether an annual review discussion takes place.

Eligible employees within the report are based on these criteria:

- Start Date used – note the start date must be selected as per the detailed steps below, anyone with a start date after the date chosen will not appear on the report.
- Assignment Type = Employee
- Assignment Status Type = Active
- Normal Working Hours = Greater than 7

- Primary Assignment Flag = Yes
- Worker category **is not** Guaranteed Hours Summer or Guaranteed Hours
- See Appendix for clinical grades **not** included within the report

The reports focus on:

- Listing and summarising the eligible employees and numbers for the Academic Year
- Listing and summarising the completed eligible staff records for the Review Period/Academic year
- Flagging eligible staff who don't yet have a 'check in' (completion) record for the Academic Year and those who have more than 1 record.
- Providing more detailed feedback on the answers to the questionnaires to help Managers and HR understand the process and meet reporting requirements.

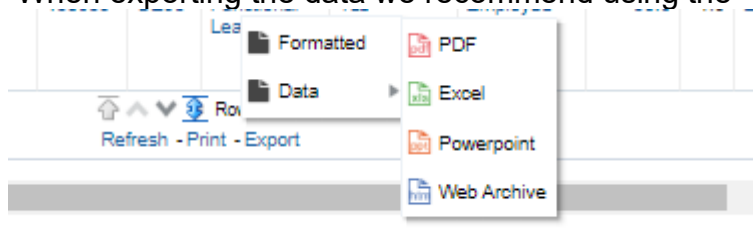
Checking Eligibility - It is advisable to check the report in advance of the annual reporting deadline (usually the 31st July each year) to ensure that all eligible staff are captured. Further details on how to do this are outlined below.

If you have questions about the reports or the data returned on them, please raise a Service Request>Enquiry>Annual Review.

Data tables can be Printed or Exported into excel - if helpful. Click on the available options at the end of the table:

[Refresh](#) - [Print](#) - [Export](#)

When exporting the data we recommend using the "Formatted" and Excel option:



In Brief...

This is a simple overview of the process.

1. If you are a Line Manager, click on 'My Team' and select the Annual Review Reporting Dashboard App
2. If you are a School/Department Administrator (SDA) or HR Partner, click on 'My Client Groups' and select the Annual Review Reporting Dashboard App
3. On the tab 'Eligibility and Completion Summary' Select the Employee start date. Click Apply
4. Review the tab 'Eligibility and Completion Summary' or 'Completed Annual Reviews' and use the filters as required

For detailed guidance see the next section.

In Detail...

If you are a Line Manager, click on 'My Team' and select the Annual Review Reporting Dashboard App.

If you are a School/Department Administrator (SDA) or HR Partner, click on 'My Client Groups' and select the Annual Review Reporting Dashboard App.

'Eligibility Rules Info' tab

This is a reminder for anyone viewing the reports regarding the pre-defined criteria used, as outlined above.

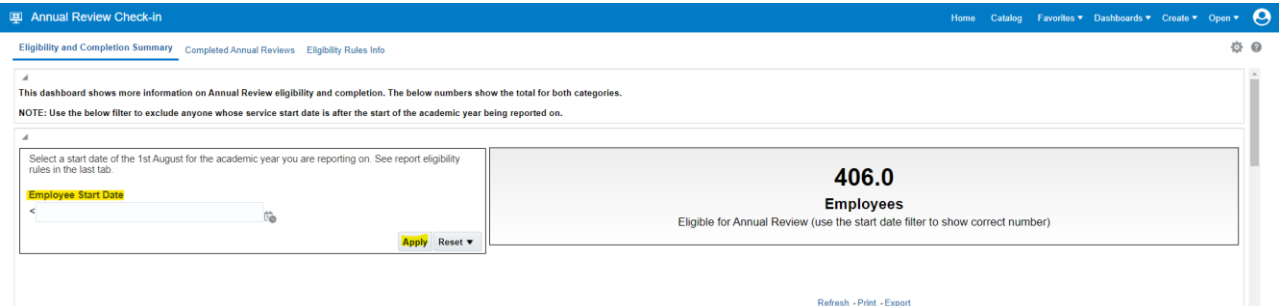
'Eligibility and Completion Summary' Tab

This tab of the report allows you to view all eligible employees, a summary of who has completed their annual review and those who have not.

The reports will list all employees that meet the pre-defined reporting criteria as outlined in the 'Before you start' section above and will also display results based on your role. (Line managers at department level (direct and indirect reports), SDAs at business unit level (within their area of responsibility) and HR at organisational level). If you select options above that are not within your area of responsibility you will not see any data.

1. To see the correct data for the academic year. In the 'Employee Start Date' field select the 1st August of the academic year you wish to report on, for example for the 2021-2022 academic year use 01/08/2021.

2. Click Apply



The screenshot shows a web application interface for 'Annual Review Check-in'. The top navigation bar includes 'Home', 'Catalog', 'Favorites', 'Dashboards', 'Create', and 'Open'. The main content area is titled 'Eligibility and Completion Summary' and contains the following text:

This dashboard shows more information on Annual Review eligibility and completion. The below numbers show the total for both categories.
NOTE: Use the below filter to exclude anyone whose service start date is after the start of the academic year being reported on.

Select a start date of the 1st August for the academic year you are reporting on. See report eligibility rules in the last tab.

Employee Start Date

< [Date Picker] [Apply] [Reset]

406.0
Employees
Eligible for Annual Review (use the start date filter to show correct number)

Refresh - Print - Export

3. You can filter the report using the following Department Filters:

- Business Unit
- College /PSG
- School/Planning Unit
- Department
- Manager

The below report lists all employees who are eligible for an Annual Review. Use the Departments filter to narrow down the list of eligible employees. The list is also updated when the above Employee start date filter is used.

Department Filters

Business Unit: --Select Value--
 College/PSG: --Select Value--
 School/Planning Unit: --Select Value--
 Department: --Select Value--
 Manager Name: --Select Value--

Apply Reset

Employee Name	Employee Email	Job Name	Normal Working Hours	Manager Name	Manager E-Mail	Employee Start Date	Projected Contract End Date	Assignment Type	Primary Assignment Flag	Assignment Status Type	Worker Category	Business Unit	College/PSG	School/Planning Unit	Department
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- Review completion records in 'completed annual reviews' section
- Select the review period (for the current academic year)
- Click Apply

Use the 'Review Period' filter to narrow the data to the current or required Academic year (Review Period).

Review Period: UoE Review Period 2021/2022

Apply Reset

2.0
Employees
 Completed Annual Review (select a review period filter to show correct figure)

Refresh - Print - Export

7. View the details of eligible staff who have completed their annual review

Completed Annual Reviews - The below report lists all eligible employees who have completed an Annual Review. See report eligibility rules in the last tab.

Review Period	Check-In Template	Employee Name	Check-In Doc Name	Normal Working Hours	Employee Start Date	Grade Step
UoE Review Period 2021/2022	Annual Review Completion Record	[REDACTED]	Annual Review Completion Record 4/05/2022	35.0	September 01, 1986	UE 10 - Step 13

8. View the details of **outstanding annual reviews** in the 'Number of Check Ins' section for eligible employees

Eligible staff who have not completed a check in for the review period will have a 'zero' in the 'number of check ins in review period' column. This section can be filtered on Manager Department and Manager Name. Click Apply once you have made your selection to display the results.

The below list shows the number of check-ins for eligible employees for the review period selected above. Everyone with 0 check-ins has not completed an annual review check-in. Use the up arrow in the header of the number column to sort it in ascending order, so that everyone with 0 check-in is shown on top.

Manager and Department Filters

Use this filter to see stats for specific managers or departments.

Manager Department: --Select Value--
 Manager Name: --Select Value--

Apply Reset

Review Period	Employee Name	Number of Check-Ins In Review Period	Employee E-mail	Manager Name	Manager E-Mail	Manager Department	Normal Working Hours	Assignment Status Type	Employee Start Date	Primary Assignment Flag	Assignment Type	Worker Category	Grade Step
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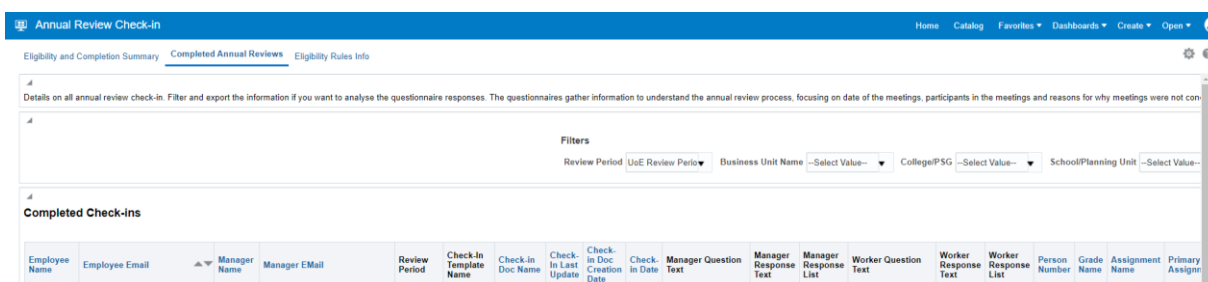
Use the arrows in the 'number of check-ins in review period' column to sort this into ascending order, so that everyone with a '0' is at the top.

'Completed Annual Reviews' tab

This tab of the report allows you to view completed Annual Review 'Check Ins' in more detail, including answers to employee and manager questionnaires. You should check the filters meet your requirements and Click Apply to view the report.

The questionnaires gather information to understand the annual review process, focusing on dates of the meetings, participants in the meetings and reasons why meetings were not conducted.

Note that the review period is carried over from the selection made on previous page but can be amended here, this will also update on the previous tab if changed here.



Employee Name	Employee Email	Manager Name	Manager EMail	Review Period	Check-In Template Name	Check-In Doc Name	Check-In Last Update	Check-In Doc Creation Date	Check-In Date	Manager Question Text	Manager Response Text	Manager Response List	Worker Question Text	Worker Response Text	Worker Response List	Person Number	Grade Name	Assignment Name	Primary Assigner
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Appendix

Clinical Grades not included within the reports are as follows, due to them following the NHS process:

- AC3A
- AC3B
- ACN2
- ACN3
- ACN4
- ACT3
- ACT4
- AM3B
- AMN2
- AMN3
- AMN4
- AMT4