



People and Money system

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

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.

There are two reports available in the 'Annual Review Dashboard' App as follows:

- **Annual Review Check-in Report** – shows a list of all active employees and notes the status of the annual review check-in for the review period(s) selected.
- **Completed Annual Reviews** – shows the date and participants in the annual review meeting or the reason why an annual review was not conducted.

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. Employees who have changed roles within the review period will only be displayed in their current assignment(s). The details of the person running the report will not appear.

The reports have been updated (10 July 2024) and are now built to show all employees within your area of responsibility, we have removed all eligibility criteria from the report.

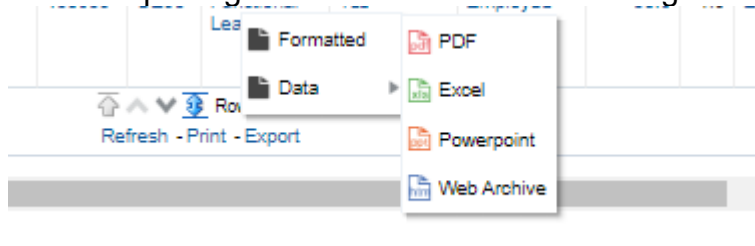
Typically, the annual review reporting period runs from 1st August to 31st July but employees and managers have until the 31st August to input the dates of any meetings held or the reasons for non completion. Please refer to the [How to record your Annual Review for employees / line managers](#) for further information.

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. 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...

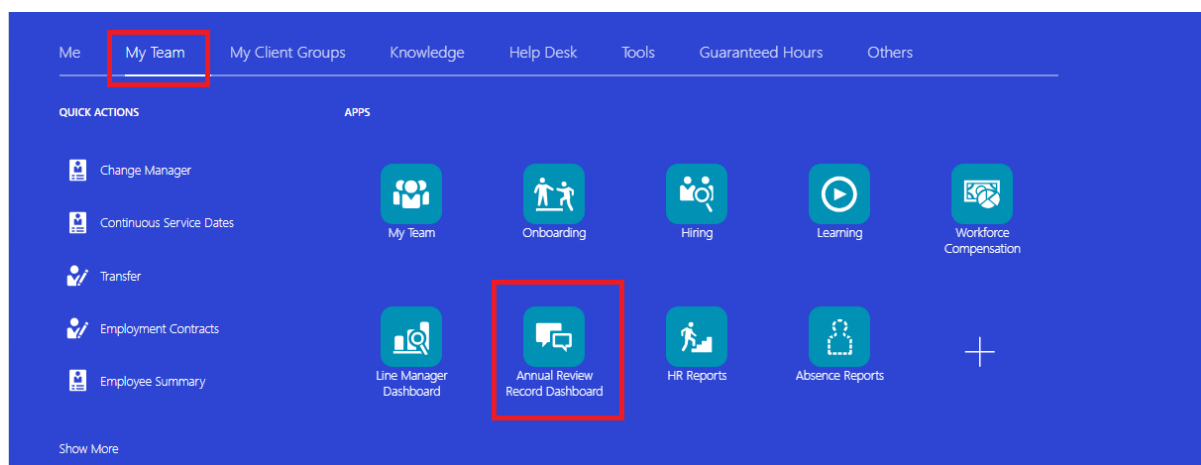
This is a simple overview of the process.

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 ‘Annual Review Check In report’ Select the Review Period and apply relevant filters as required, then select apply
4. To review the details of the completed check in go to the completed annual reviews tab and apply relevant filters as required, then select apply.

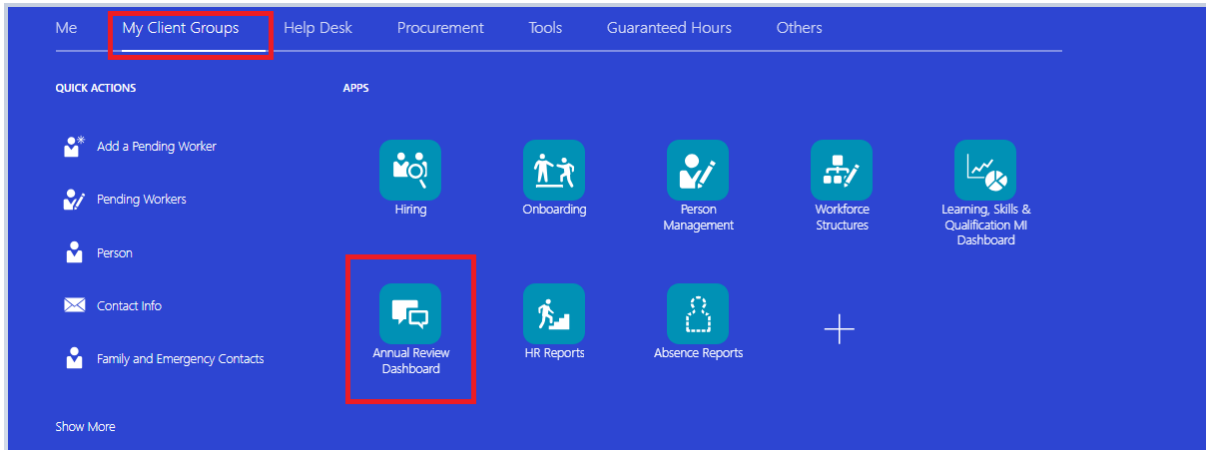
For detailed guidance see the next section.

In Detail...

1. If you are a Line Manager, click on ‘My Team’ and select the Annual Review Record Dashboard App.



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



3. The welcome page of the dashboard introduces the report and its parameters. Navigate to the **'Annual Review Check In report'**

Select the **Review Period** and filter the report as required using the following:

- College /Professional Services Group
- School/Planning Unit
- Department
- Sub Department (CMVM only)
- Job Family
- Worker Category

Then select **apply**.

Person Number	Assignment Number	First Name	Preferred Name	Last Name	Business Unit Name	College/Professional Services Group	School/Planning Unit	Department	Sub Department (CMVM only)	Primary Assignment Flag	Personal Job Title	Work Relationship Start Date	Projected End Date	Assignment Category	Worker Category	Assignment Type	Job Family	Normal Working Hours	Assignment Status Type	Number of Check-ins in Review Period
					University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services		Yes				Open Ended	Employee	Professional, Administration and Operational	35	Active	0	
					University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services		Yes				Open Ended	Employee	Professional, Administration and Operational	35	Active	1	
					University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services		Yes				Open Ended	Employee	Professional, Administration and Operational	35	Active	0	
					University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services		Yes			31/12/2024	Fixed Term	Employee	Professional, Administration and Operational	35	Active	0	
					University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services		Yes				Open Ended	Employee	Professional, Administration and Operational	35	Active	0	

4. Scroll along to the right hand side of the report and review the column titled **'No of Check Ins in Review Period'** to establish the annual review status.

A "1" means the person has had an annual review check-in recorded in the system in the review period selected. A "0" means that no status update has

been logged in the system. (Please refer to the [How to record your Annual Review for employees / line managers](#) for further information).

Use the arrows in the 'number of check-ins in review period' column to sort this into ascending order, everyone with a '0' is at the top, this means that no status update has been logged in the system.

Assignment Number	First Name	Preferred Name	Last Name	Business Unit Name	College/Professional Services Group	School/Planning Unit	Department	Sub Department (CMVM only)	Primary Assignment Flag	Personal Job Title	Work Relationship Start Date	Projected End Date	Assignment Category	Worker Category	Assignment Type	Job Family	Normal Working Hours	Assignment Status Type	Number of Check-ins in Review Period	Employee Email	Manager Name	Manager E-Mail
				University of Edinburgh	University Secretaryps Group	Student Services Unit	Academic Services						Open Ended	Employee	Professional Administration and Operational		35	Active	1			
				University of Edinburgh	University Secretaryps Group	Student Services Unit	Academic Services						Open Ended	Employee	Professional Administration and Operational		35	Active	1			
				University of Edinburgh	University Secretaryps Group	Student Services Unit	Academic Services						Open Ended	Employee	Professional Administration and Operational		35	Active	0			
				University of Edinburgh	University Secretaryps Group	Student Services Unit	Academic Services						Open Ended	Employee	Professional Administration and Operational		35	Active	0			

Completed Annual Reviews

1. The Completed Check-in Report shows the date and participants in the annual review meeting or the reason why an annual review was not conducted (e.g. maternity leave or probation). It only shows those who have recorded a check-in **and** completed the questionnaire within the review period selected (these employees will show as a '1' in the Annual Review Check-in report, No of reviews in review period column).

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.

Filter the report as required using the following:

- College /Professional Services Group
- School/Planning Unit
- Department
- Sub Department (CMVM only)
- Job Family
- Worker Category
- Manager Name
- Check-in date

Then select **apply**.

Annual Review Check-in

Welcome Page Annual Review Check-in **Completed Annual Reviews**

Completed Check-in Report

Details on all annual review check-in files and export the information if you want to analyse the questionnaire responses. The questionnaires gather information to understand the annual review process, focusing on date of the meetings, participants in the meetings and reasons for why meetings were not conducted.

Review Period: UoE Review Period 2023/2024

Business Unit Name: University of Edinburgh

College/Professional Services Group: University Secretaries Group

School/Planning Unit: Student Services Unit

Department: Academic Services

Sub Department (CMM only):

Job Family: Professional Administration and Operational

Worker Category: Employee

Manager Name: [Empty]

Check-in Date: [Empty]

Apply Reset

Person Number	Assignment Number	First Name	Preferred Name	Last Name	Business Unit Name	College/Professional Services Group	School/Planning Unit	Department	Sub Department (CMM only)	Primary Assignment Flag	Personal Job Title	Work Relationship Start Date	Projected End Date	Assignment Category	Worker Category	Assignment Type	Job Family	Normal Working Hours	Assignment Status	Review Period	Check-in Template Name	Check-in Doc Name
					University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services						Open Ended	Employee	Professional Administration and Operational		35	Active	UoE Review Period 2023/2024	Annual Review Completion Record	Annual Review Completion Record 19/06/2024
					University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services						Open Ended	Employee	Professional Administration and Operational		35	Active	UoE Review Period 2023/2024	Annual Review Completion Record	Annual Review Completion Record 19/06/2024
					University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services						Open Ended	Employee	Professional Administration and Operational		35	Active	UoE Review Period 2023/2024	Annual Review Completion Record	Annual Review Completion Record 19/06/2024
					University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services						Open Ended	Employee	Professional Administration and Operational		35	Active	UoE Review Period 2023/2024	Annual Review Completion Record	Annual Review Completion Record 19/06/2024
					University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services						Open Ended	Employee	Professional Administration and Operational		35	Active	UoE Review Period 2023/2024	Annual Review Completion Record	Annual Review Completion Record 19/06/2024

Please note, the report will display multiple rows per employee per review period. The example below shows the completed annual review for one employee which was recorded by the Line Manager.

Review Period	Check-In Template Name	Check-in Doc Name	Check-in Doc Creation Date	Check-in Date	Check-In Last Update	Worker Question Text	Worker Response Text	Worker Response List	Manager Question Text	Manager Response Text	Manager Response List
UoE Review Period 2023/2024	Annual Review Completion Record	Annual Review Completion Record 19/06/2024	20/06/2024	19/06/2024	20/06/2024				Q1. Did the employee have an Annual Review/Performance and Development Review discussion this academic year (August to July)?		Yes
UoE Review Period 2023/2024	Annual Review Completion Record	Annual Review Completion Record 19/06/2024	20/06/2024	19/06/2024	20/06/2024				Q2.2 Record the date of the Annual Review/Performance and Development Review.	2024-06-19	
UoE Review Period 2023/2024	Annual Review Completion Record	Annual Review Completion Record 19/06/2024	20/06/2024	19/06/2024	20/06/2024				Q3. This meeting was held with:		Line Manager (you)

If the check-in was to record non completion of an annual review (e.g. because of absence) this will also be displayed.

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