ENCOMPASSING VISIONS™

Printing Performance Reviews by Reviewer Role

Version 2018.1.0

Revised 2018

Printing Performance Reviews By Reviewer Role

Use **System Policies** for **Performance Management** to turn on both the supervisor and incumbent as default reviewers (you can do this for one component of the reviews like competencies or for all three). **Administration>Policies>Employees>Business Objectives, Competency Reviews and /or Professional Development Objectives**

Sub Category	Policy	Policy Value	Memo Notes
Business Objectives	**Enable Business Objectives?**	**YES**	
Business Objectives	Do you require Employees to approve their Business Objectives?	YES	Leads are always required to approve Business Objectives. Select YES to also require employees to approve Business Objectives. Objectives must be approved before they can be reviewed.
Business Objectives	Do you want supervisors to be default reviewers for Business Objectives?	YES	
Business Objectives	Do you want incumbents to be default reviewers for Business Objectives?	YES	
Competency Reviews	Allow clients to perform skill assessments?	NO	
Competency Reviews	Allow subordinates to perform skill assessments?	NO	
Competency Reviews	Enable Competency Characteristics Reviews?	YES	
Competency Reviews	Use default characteristics (sub-review questions) if there are none specified for job group?	YES	Default characteristics are the characteristics that have no job group assigned to them. Choose Yes to use the default characteristics when there are no characteristics specified for the job group of the employee's job. Choose No if you do not want any characteristics used in this scenario.
Competency Reviews	Competency Characteristics Threshold (1-10)	7	
Competency Reviews	What constitutes a strength in this organization?	3.75	
Competency Reviews	Justify High/Justify Low comments must be entered to make the review complete?	YES	
Competency Reviews	Do you want supervisors to be default reviewers for Competency Reviews?	YES	
Competency Reviews	Do you want to allow supervisors to copy their employees incumbent review?	YES	If this is set to Yes, then the supervisor will be able to copy a completed incumbent review to the supervisor review.
Competency Reviews	Do you want incumbents to be default reviewers for Competency Reviews?	YES	
Performance Reports	Number of Skill Strengths/Development Opportunities to display on the performance report (1-10).	10	
Performance Reports	What percentage of the overall score will be made up of the Competency review?	50	
Performance Reports	What percentage of the overall score will be made up of the Business Objectives review?	25	
Performance Reports	What percentage of the overall score will be made up of the Professional Development review?	25	
Performance Reports	When printing performance reports, only include reviews completed in the past nn days. (0-365)	365	This policy sets the default From Date for the "Print Performance Report" Review Completion Date filter.
Performance Reports	When printing performance reports, what additional text do you want to include?		This text will be appended to the end of the performance report details immediately before the signature lines(s).
Performance Reports	Enable Performance Report Archiving?	YES	This policy enables Employee Performance Reports to be archived and approved by both the lead and the employee in the database.
Professional Development Objectives	Enable Professional Development Objectives?	YES	
Professional Development Objectives	Do you require Employees to approve their Professional Development Objectives?	YES	Leads are always required to approve Professional Development Objectives. Select YES to also require employees to approve Professional Development Objectives. Objectives must be approved before they can be reviewed.
Professional Development Objectives	Do you want supervisors to be default reviewers for Professional Development Objectives?	YES	
Professional Development Objectives	Do you want incumbents to be default reviewers for Professional Development Objectives?	YES	

What this will do is cause a user to see an *'incumbent'* review for one's self; that is, to be completed during the review period. It will also cause a *'supervisor'* review to be on the list of reviews that the supervisor needs to complete for that employee.

E.g. Philip Black is the leader of eRecords and GIS Solutions. Rachel Lee reports to Philip Black. When Rachel logs in and goes to the **Employee>Complete Reviews** screen she sees that she has an *incumbent review* that needs to be completed for herself:

It's All About Accountability

When Philip logs in and goes to the **Employees>Complete Reviews**, he sees that Rachel Lee is one of the people in his Organization Unit that he needs to do a review for:

Philip sees that it is a ***competency review*** that he is expected to complete since he is Rachel's supervisor.   The reviewer role is ***'supervisor'***:

When it comes time to view/print the reviews, Rachel goes to **Employees >Print Performance Review** where she will see only herself on the list of people she can print reviews for (if you were doing full 360 degree reviews she would also see any employees she had completed a review for ***e.g. reviewer role- peer or subordinate)***:

When Rachel prints a review for herself, it will **ONLY** pick up the review that Rachel did for herself (***reviewer role 'Incumbent'***). It does **NOT** show any of the supervisor review results. This is hard coded into the system so that an employee can only ever see a review of her/himself. So, Rachel can go ahead and print this review that shows her results only.

It's All About Accountability

When Philip Black goes to view/print reviews, he sees all of the people that he has done a review for – including Rachel Lee.


There are three different things that Philip can print about Rachel from here:

1. **The Default** – which will print all reviews that have been completed that meet the date criteria (if selected). From the view/print reviewers screen, the '*Reviewer Role'* filter is defaulted to '*Supervisor*' . Change the **'Reviewer Role'** to **'All'** so all reviewer roles are shown. This means both supervisor and incumbent in your scenario.

It's All About Accountability
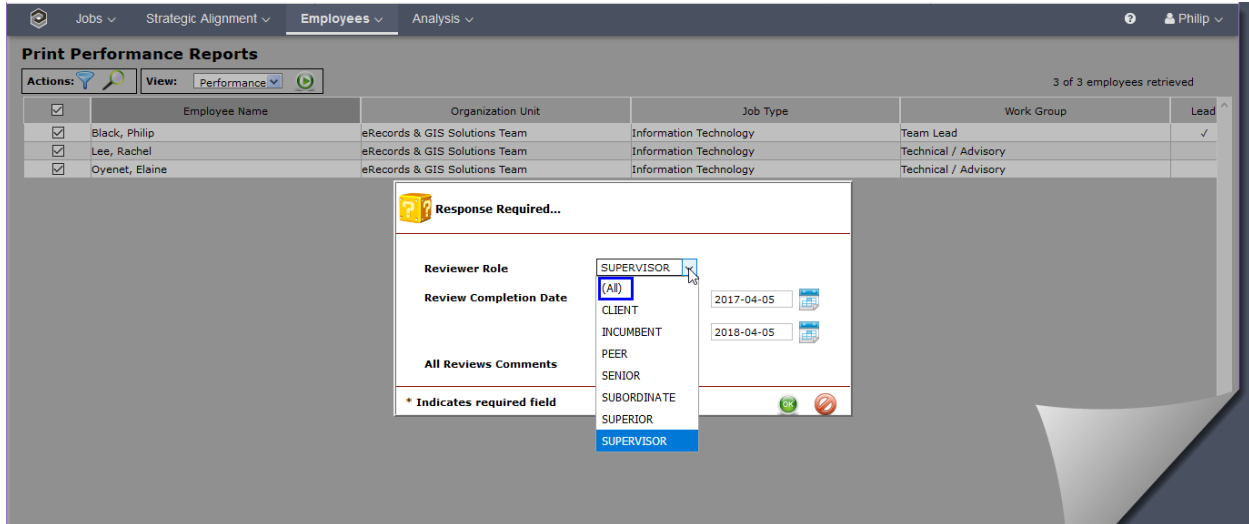
This option will average the results of the incumbent and supervisor reviews together for an overall performance rating.

Note: that the reviews and reviewers included in the report are identified at the top of the performance report:
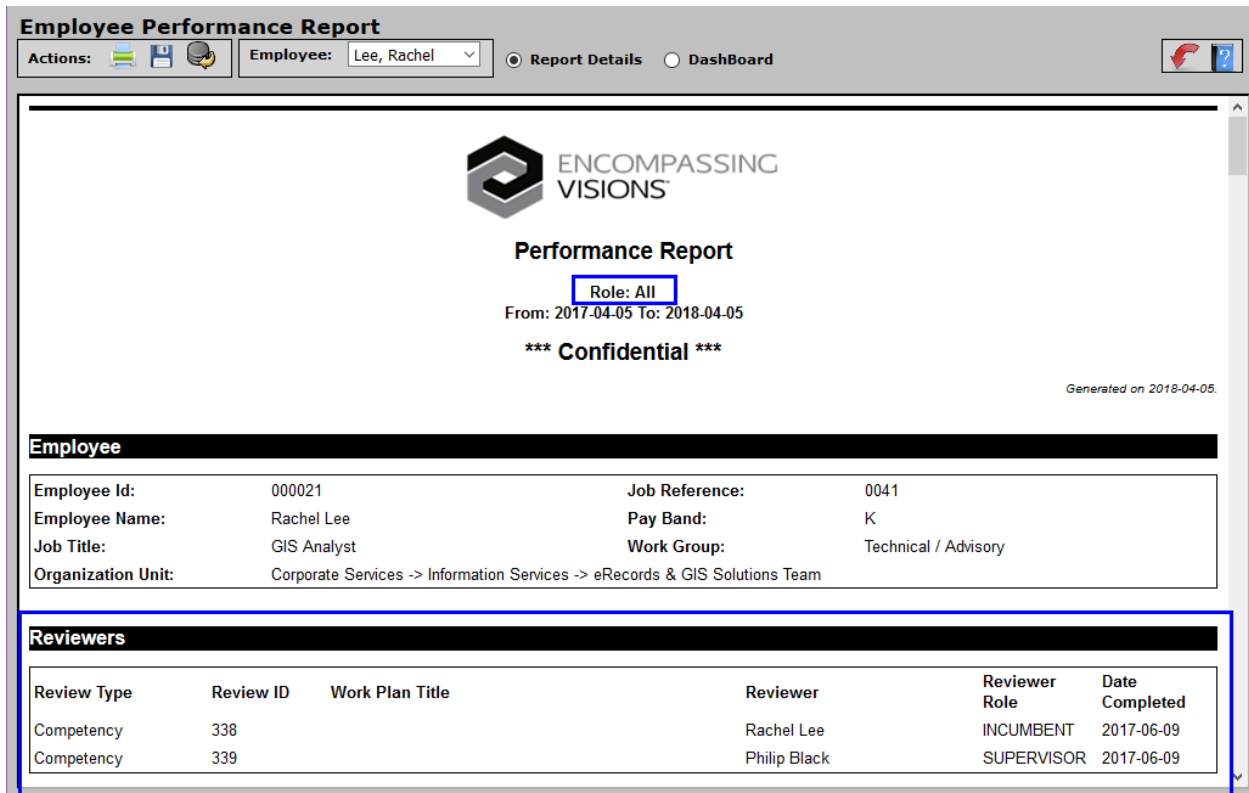
1. The ***supervisor review only*** – in order to print just the supervisor review, you would need to choose the '***supervisor***' reviewer role for this filter:

It's All About Accountability

This will generate the performance report from just the Supervisor's review.

2. The third option is that the supervisor can print just the **incumbent review** by selecting the appropriate reviewer role in the filter:

It's All About Accountability
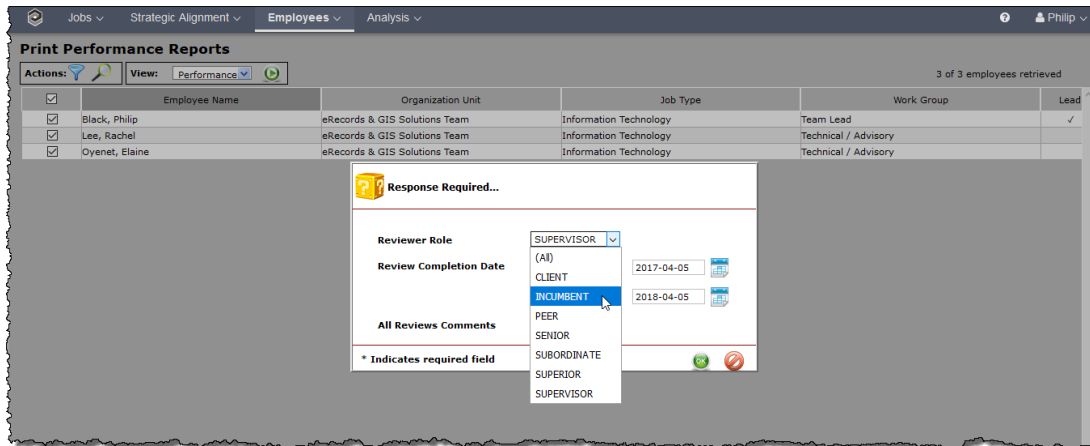
This generates the performance report for just the *incumbent*.

Note: this can be used to print any single reviewer role perspective. If you wanted to print all the *peer reviews* for example, then we'd show only peer reviews and average the results for an overall score by the peers.
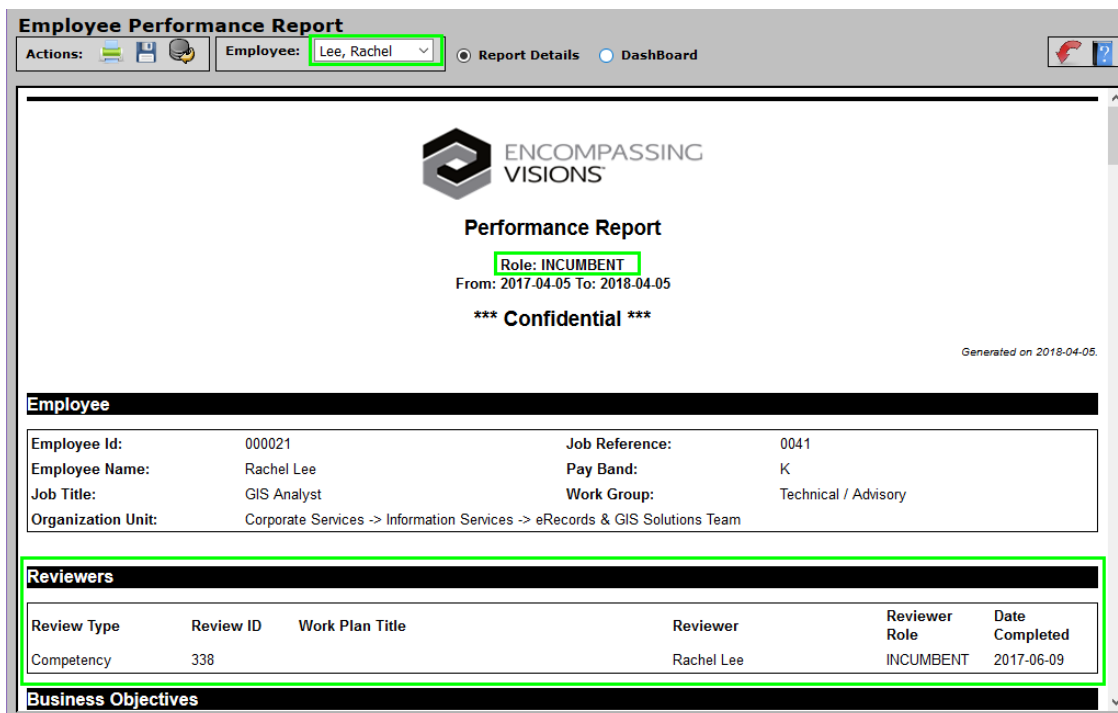
So, you see, you can do what you were asking for. The employee prints their own review of themselves. The supervisor prints the supervisor review only and then they can compare results. After making any adjustments to the review, the supervisor would then re-print just the supervisor role for filing.

Note: The same process is followed for doing work plan reviews.

It's All About Accountability

One last reminder, the determination of the reviewers can be done automatically based on the organization structure when the system policies for default reviewers are turned on. However, the reviewers can also be identified manually (if the policies are turned off) through the **Employees > Employee Reviewer/Review**. In order to do what you have indicated, someone – either the employee, supervisor or administrator – would have to go to **Employees > Employee Reviewer/Review** and assign all of the appropriate reviewers with the correct reviewer roles. This requires security access to the **Employees > Employee Reviewer/Review** module and can be a significant effort depending upon the number of employees you are talking about.

If you want the default reviewers to be correctly identified, then your organization structure within *en*Compassing Visions must be error-free and must not be changed until your review period is completed or the incorrect reviewers could be identified as the defaults. That is the *one advantage* to a **manual process**.

Lastly, if you find a situation where you have two supervisors that should review the same employee (maybe the employee changed organization units half way through the year and you want to have both complete a review), then can add the 2nd reviewer into the system manually as a supervisor reviewer role if you want the system to average the two supervisor reviews together or, if you only wanted the current supervisor's perspective to be shown in the final printed result you may want to assign the a reviewer role of '*other*'.

Note: that if you had two supervisor reviews, you could use the review completed date filters to print only one supervisor's review (review completed date is shown in the generated performance review so as long as they weren't both completed on the same day, you would be able to filter one out).

For example, if you knew that the review you wanted to print was the one completed on September 6th, 2014, you could enter the following in the date filter to filter out all but the one completed on September 6th. This will work for any reviewer role or if no reviewer role is specified:

This last bit is a little complicated so if you have additional questions, please don't hesitate to contact us.

It's All About Accountability