

Job Aid: Completing a Review for My Team Member

Core Concepts

What is a review?

Reviews allow individuals, managers, and others to provide feedback to reviewees about performance. Reviews use review cycles and review forms to manage the review process. You create reviews based on an associated review cycle and a review form.

What are the elements of a review?

The review cycle sets the basic characteristics of a review, such as the type of review and the relevant dates.

The review form sets policies and contains sections for reviews.

What are review sections?

Review sections are like topics inside a review. The performance administrator configures which sections are in a review. Depending on how the performance administrator configured the review form, the review owner can modify those sections by changing their weights.

What are the sections that can be in a review?

Reviews can contain one or more of the following review sections:

- o **Core Skills:** Rate the reviewee's proficiency in the core skill area. Core skills apply to all reviewees, not only individual reviewees.
- o **Individual Skills:** Rate the reviewee's proficiency in a particular skill that is specific to the individual reviewee.
- o **Individual Goals:** Rate the reviewee's progress toward the reviewee's goals.
- o **Narrative:** Write free-text comments. Reviewers can rate narrative sections.
- o **Ad hoc Skills:** Rate the reviewee's proficiency in the specific skill. This section will only appear when the *Allow reviewer or reviewee to add skills when initiating the review* policy is enabled on the review form.
- o **Talent Review:** Fill the information related to the reviewee's job and potential.
- o **Additional Info:** Rate the reviewee based on the reviewee's responses for the questions added to the section. The admin can add any content related information to the reviews. The admin can also mark this section as required.

How do section weights affect review scores?

Each review section that can be rated has a score. The performance administrator configures a review form to specify whether sections support weights. If sections support weights, then the performance administrator configures the weights for each section. These individual weighted scores for each section combine into one overall score for the entire review.

Depending on how the performance administrator configured the review form, you can change the weights of sections.

What are section items?

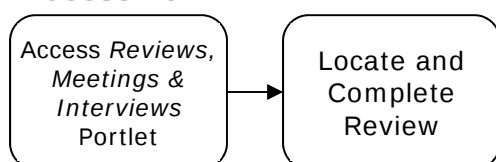
Section items are like sub-topics within a review section. Depending on how the performance administrator configured the review form, the review owner can add items to review sections, or remove items from review sections.

How do item weights affect overall review scores?

Items within each section can also be rated. The performance administrator configures a review form to specify whether items within each section support weights, and can be rated. If section items support weights, then the individual weighted scores for each item combines into an overall score for the section. The overall score for each section combines into an overall score for the review. The overall score is shown on the review header.

Process

Process flow



Process steps

Step	Action
1. Access <i>Reviews, Meetings & Interviews</i> Portlet	Navigate to: Me > Reviews, Meetings & Interviews
2. Locate and Complete Review	- Locate the Team Member's review and click the Complete in the Actions column. ☞ <i>You can complete the review for your team member even before the team member has filled it or you can complete it once the team member fills and submits to you.</i> - Fill the review. Provide ratings and give comments for each section. - In each section, you have the provision to pull impressions given by others in your reviews. You also have the provision to insert sample comments and ability to format the text using the rich text editor. - As a manager, you can calibrate a review for your team. For more information, refer to the job aid: Calibrate Performance Review for my Team.

Additional Information

Can I attachments to my Team Member's review?

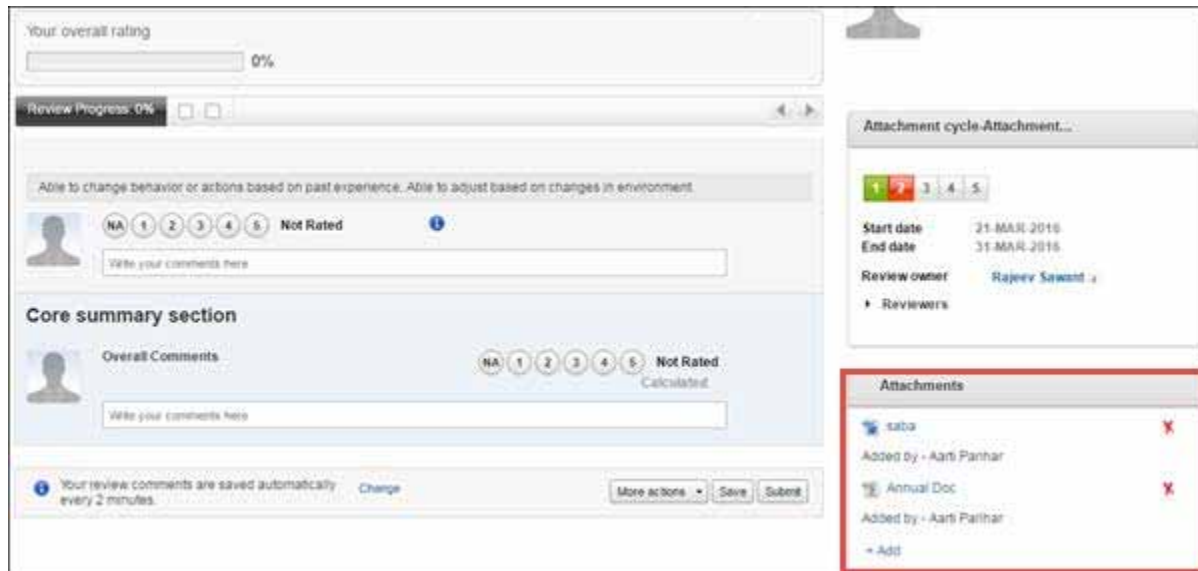
Users can attach files, such as award certificates, appreciation emails, and so on in the review. This will help the rater assess the reviewee in a better way. The user can attach the following file formats:

- o Word
- o Excel
- o PowerPoint
- o Email

- o Images (.jpeg, .png, .bitmap)
- o Zip

➡ **Note:** Review administrators need to enable **Allow file attachment on review** in the review form.

Once the file is attached, the **Attachments** section will appear in the review. Reviewers can attach a file only when the review is in the **Open** state. All the users associated with the review, will be able to view the attached files.



The Reviewer can also add the attachments using the + **Add** link in the **Attachments** section.

The Reviewer can click the filename and download the file. The user can delete the attachment depending on his/hers role in the review. Reviewee can delete attachments that are added by self and performance admin/review owner can delete any attachment. The user will not be able to delete the files if they are in **Released** and **Finalized** state.

Can I hide review sections from reviewee after review is released?

Once the review is released, some of its review section can be hidden from the reviewee by clearing the **Self** checkbox under **Comments Only** by on the section of the review form. By default, the **Self** checkbox is selected. The performance administrator has to clear the checkbox to hide the section from the reviewee even after the review is released. These private sections are also hidden from the PDF view. By doing this, the hidden section will not surface to the user in any state of the review.

The screenshot shows the 'Section Details' form in Saba Cloud. At the top, it says 'Add sections below to allow review of skills2016, goals and narratives.' with an 'Add New Section' button. The 'Section Name' field is filled with 'Core Skills'. Below this, the 'Review Section Type' is set to 'Core Skills2016'. The 'Instructions' field is empty, with a rich text editor toolbar above it. A search bar for 'Core Skills2016' shows 'no items found'. The 'Policies' section has several checkboxes: 'The review owner and the performance administrator can add or remove skills2016 from review sections' (checked), 'Make this section required' (unchecked), 'Items within the section can be weighted' (unchecked), 'The review owner or performance administrator can change section weight' (unchecked), 'Show N/A in the rating scale' (checked), and 'Show only overall section ratings or only comments' (checked). The 'This section accepts:' section has radio buttons for 'Ratings & Comments' (selected), 'Comments Only', and 'Ratings Only'. The 'Comments Only by:' section has checkboxes for 'Self' (checked), 'Manager' (checked), 'All Level Manager' (unchecked), 'Alternate Manager' (unchecked), 'Goalkeeper' (unchecked), 'Points' (unchecked), and 'Direct Reports' (unchecked).

Can a review cycle be closed if a reviewee is terminated and the review contains a Future Goals section?

Yes. If a review contained a Future Goals section, and the reviewee was terminated before the review cycle was completed, then the review cycle can be closed.

Is there a way to provided quick acknowledgement of feedback received?

You can simply click the **Thank You!** button provided with the impression details on your Impressions page. This will send a Thank you to the sender to let them know you have received and appreciate their feedback.

References

- Saba Cloud Information Center
- http://sabapeoplecloud.com/support/index.php/Saba_Admin:Home