

## Quick Start Guide – Performance Manager

# 360 Reviews

360 Reviews in Performance Manager™ open up employee performance appraisals to greater depth and breadth of feedback. This full-circle view of performance provides more insight for coaching and development, and ensures more accurate, effective, and fair assessments.

## Scheduling Reviews

The process for scheduling 360 Reviews is the same as when scheduling appraisals. An administrator creates a new schedule from the *360 Review Schedule* page under the **Admin** area in Performance Manager and sets the desired options. Once the schedule becomes active, the necessary tasks are assigned.

An option is available when scheduling 360 Reviews that requires selecting a Facilitator for the review. A Facilitator is responsible for managing various aspects of the review process, such as reviewing employee selections for contributing reviewers, making final selections for reviewers, and managing the feedback received from those selected reviewers.

### Facilitator Set Up

Who will be the facilitator for the 360 review?

Employee's Manager

Other

## Suggesting Reviewers (Subject)

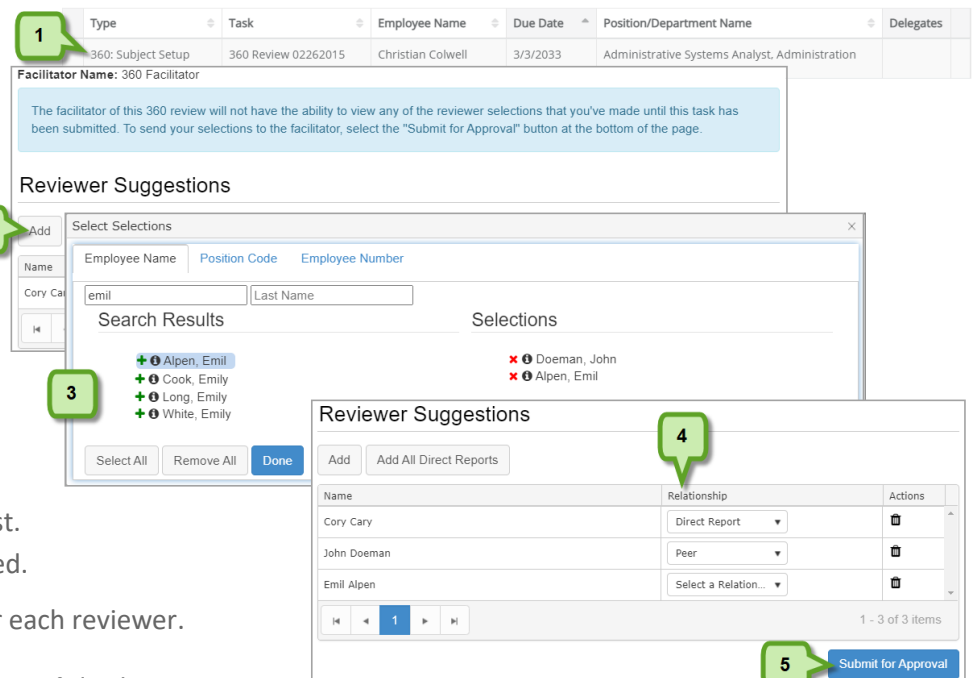
One of the tasks assigned when a 360 Review schedule is activated is for the subject of the review (meaning the employee the review is about) to suggest other employees to perform a review on them. These suggestions are reviewed by the Facilitator before review tasks are sent to employees.

1. Locate and select the **360 Setup - Subject** task on the *Tasks* page.

2. Selecting **Add** opens the picker window.
3. Locate the employees to suggest for the review using the available filters and tabs. Selecting the **+** next to each name adds them to the Selections list. Select **Done** when finished.

4. Select a **Relationship** for each reviewer.

5. Selecting **Submit for Approval** displays a confirmation window verifying the completion of the task. Selecting **OK** confirms the submission.



The screenshot shows the 'Tasks' page with a table of tasks. A callout '1' points to the '360: Subject Setup' task. Below the table, a 'Facilitator Name' field is set to '360 Facilitator'. A message box states: 'The facilitator of this 360 review will not have the ability to view any of the reviewer selections that you've made until this task has been submitted. To send your selections to the facilitator, select the "Submit for Approval" button at the bottom of the page.'

The 'Reviewer Suggestions' window is open. Callout '2' points to the 'Add' button. Callout '3' points to the search results list where several employees (Alpen, Emil; Cook, Emily; Long, Emily; White, Emily) have a green plus sign next to their names. Callout '4' points to the 'Relationship' dropdown menu for Cory Cary, which is set to 'Direct Report'. Callout '5' points to the 'Submit for Approval' button at the bottom right of the window.

Type	Task	Employee Name	Due Date	Position/Department Name	Delegates
360: Subject Setup	360 Review 02262015	Christian Colwell	3/3/2033	Administrative Systems Analyst, Administration	

## Reviewing Subject Suggestions (Facilitator)

A second task assigned when a 360 Review schedule is activated is for the selected Facilitator to review employee suggestions and finalize the list of reviewers. It is not necessary to use all, or any, of the suggestions made by the subject.

1. Locate and select the **360 Setup - Facilitator** task on the *Tasks* page.
2. Review the employees in the **Suggestions** table. Selecting the **+** button adds the suggested employee to the review.
3. Selecting **Add** adds other employees to the review and displays the picker window.
4. Locate the employees to perform the review using the available filters and tabs. Selecting the **+** next to each name adds them to the Selections list. Select **Done** when finished.
5. Select a **Relationship** for each reviewer.
6. Selecting **Approve and Send Tasks** displays a confirmation window to verify the completion of the task. Selecting **OK** confirms your approval.

## Performing Reviews (Employees)

Employees selected to perform a 360 Review receive a **360 Review** task, which are similar to multi-rater appraisals. Selecting the task opens the review page containing the evaluation areas for the subject. On the appraisal page, employees select ratings for the items and add comments where desired. After all items have been properly addressed, selecting **Save and Send** submits responses and closes the task.

Type	Task	Employee Name	Due Date	Position/Department Name	Delegates
360: Review	360 Review	Narayan, Nandini	10/31/2040	Admitting Coordinator, Administration	

« < 1 > »

Page size: 25

Displaying items 1 - 1 of 1

---

## Managing Responses (Facilitator)

The Facilitator of a 360 Review is responsible for managing the review cycle. This entails monitoring the status of the reviews for selected employees, reviewing feedback received, and ultimately completing the 360 Review task for everyone.

Selecting the **360 Management** task from the *Tasks* page displays the *360 Management* page, which provides an area to manage this process. The table lists all the employees selected to provide a review for the Subject along with the status of their review.

### Reviewers

Name	Relationship	Status
John Doeman	Peer	Not Started
Betsy Johnson	Peer	Not Started
Nandini Narayan	Direct Report	Complete
Natalie Rose	Direct Report	Complete

1 - 4 of 4 items

Live View

Close Review

Selecting **Live View** from under the table displays a read-only view of the appraisal page containing the ratings and feedback left by each employee for the review. All employee feedback is listed on the same page. This view of the appraisal can be printed or saved as a PDF file.

After enough reviewer responses have been received and reviewed, the Facilitator can complete the 360 Review task by selecting **Close Review**. This displays a confirmation window verifying that you wish to complete the overall task.

The **360 Management** task can be completed at any time. It is not necessary to wait for all selected employees to submit their review in order to complete the task. If a reviewer has not submitted a response to the review and the Facilitator completes the **360 Management** task, any tasks assigned to those users are removed from their task list and they are unable to submit a response.

## Report

A report detailing the results of the 360 Review is available for the Facilitator to view, download, and print as needed. This report displays the average score received from reviewers for each section and question, along with aggregates based on the reviewer's relationship to the subject.

This report is available as a Standard Report in Performance Manager, available only to system administrators.