

Quick Start Guide

Managing Feedback Lists

The updated Feedback feature in symplr Performance offers a redesigned interface and additional functionality for users. In addition, the administrative tools for managing the feature have been updated as well.

Overview

Updates to the Feedback feature include splitting the original **Title** field into three separate lists based on the type of feedback being created (Commendation, Coaching, or Corrective). Each type now has a separate list of titles, which are automatically pulled into the **Title** field when a **Type** is selected.

The Type field determines the contents of the Title field.

Feedback

* Date Of Occurrence: 8/2/2022 Not applicable

* Type: Select Feedback Type

* Notification: Select Feedback Notification

* Position: Select User's Position

* Title: Select Feedback Type First

Situation / Task: [Suggested Text](#)

0 / 3000

These three new lists are found on the *Custom Lists* page under the **Admin** area. The *Feedback Lists* item now contains **Commendation Title**, **Coaching Title**, and **Corrective Title** lists, each of which can be customized with titles that correspond to their types.

Custom List	Edit	Select
select Checklists - Population		
select Checklists - Rating		
select Checklists - Validation		
select Document Categories		
select Eval Lists		
select Feedback Lists		
Notification	Edit	
Title	Edit	
Situation Task	Edit	
Expected Results	Edit	
Disclaimer	Edit	
Action Taken	Edit	
Feedback Instructional Text	Edit	
Commendation Title	Edit	
Coaching Title	Edit	
Corrective Title	Edit	
select Goal Lists		
select Job Description Lists		
select Merit Rating Lists		

[Click here to add and edit custom lists for Recognition, Development Plans and Licenses & Certifications](#)

symplr

The original **Title** list now populates the **Title** field when adding *Notes* to an employee record. Edits made to the **Title** list do not affect any values in the new **Commendation**, **Coaching**, or **Corrective Title** lists.

Values in New Lists

In order to ensure users are able to locate the desired **Title** for feedback after the update has been released, the original **Title** list used by clients before the update has been copied into all three of the new lists.

In order to properly customize these lists, it is necessary to review each list and remove the items that do not correspond to the list type.

Example: *The original pre-update **Title** list for a client contains the value Policy Violation. Though this value is copied to the **Commendation Title** list, it doesn't really apply – it only belongs in the **Coaching** or **Corrective Title** list. Therefore, the Policy Violation value should be removed from the **Commendation Title** list.*

Adding Values to Lists

When adding new values to any of the Feedback lists, the **Value** and **Description** fields must match. While unmatching values still appear in the **Title** drop-down list, they do not properly record in the system database when selected.

Feedback Lists: Coaching Title [Rename](#)

	Value	Description	list order	Select
Edit	Attendance	.Attendance	1	<input type="checkbox"/>
Edit	Policy Violation	.Policy Violation	2	<input type="checkbox"/>
Edit	Performance	.Performance	3	<input type="checkbox"/>
Edit	Expiring License/Certification	.Expiring License/Certification	4	<input type="checkbox"/>
Edit	Non Compliant with Health/Training	.Non Compliant with Health/Training	5	<input type="checkbox"/>
	New List Item	New List Item	6	Add

[Click here to add and edit custom lists for Recognition, Development Plans and Licenses & Certifications](#)

The Value and Description fields must match!