

Human Capital Management: Step-by-Step Guide

Entering Employee Review History

This guide describes entering performance evaluation information. Employee review information can be entered in HCM for faculty, university staff and classified staff. You can use the Review History page to record performance evaluation information and to track planning and coaching sessions.

Note: Full access to the Review History page is granted to users with the CU Campus HR role. With the exception of Denver and AMC users, users with the CU PPL role have view only access to the page. Denver and AMC users with the CU PPL role have update access to the page. Additionally, row level security applies to the page.

Before You Begin

You will need the following information to record performance information in HCM:

- Employee ID of person being evaluated.
- Employee ID of any reviewer whose comments are being recorded.
- The effective date of the review. For classified staff, the effective date must be the date of signature by employee for state of Colorado reporting purposes.
- Dates of the review period, as well as the date of the next review.

Entering an Employee Review

To enter a performance evaluation:

1. Go to the Review History page.
(NavBar > Menu > Workforce Development > Employee Review History > Review Job History)
2. Enter search criteria and click **Search**.
3. Select the employee from the list of search results.
4. If review history exists, click the plus button to add a new row. Otherwise, proceed to next step.



Figure 1. Example of employee with review history, showing first of 13 reviews

If no previous reviews exist, update the page as described below. If previous rows exist, all existing values with the exception of the Eff Date will pull forward and should be adjusted, accordingly. The Eff Date will default to the current date and should be adjusted, as needed.

The screenshot shows the 'Employee Review' form with the following fields and values:

- Employee Name:** Employee
- Empl ID:** *****
- Empl Record:** 0
- Review Details:**
 - *Eff Date:** 09/25/2017
 - Review Type:** Performance
 - From Date:** 02/01/2015
 - To Date:** 01/31/2016
 - Next Review Date:** 02/01/2017
- Business Unit:** USYS (System Administration)
- Department:** 51000 (Employee Services)
- Company:** CU
- Job Code:** 2265 (Business Services Program Mgr)
- Position:** 00680149
- Supervisor:** ***** Employee Name
- Rating Scale:** 5OEP (5-Tier Officers/Exmpt Prof)
- Scale Type:** A (Average)
- Rating Model:** 5OEP (5-Tier Officers/Exmpt Prof)
- Review Rating:** 4 (Level 4)
- Total Review Points:** 0

Buttons at the bottom include: Save, Return to Search, Notify, Add, Update/Display, and Include History.

5. In the **Eff Date** field, enter the effective date of the review.

Note: The **Eff Date** for classified staff performance evaluation rows must be the date of signature by employee. This is required for state of Colorado reporting purposes.

6. From the **Review Type** list box, select **Performance**.

7. Update the **From Date**, **To Date**, and **Next Review Date** values. The **Next Review Date** is typically the first day following the end of the next review period.

8. Select the **Rating Scale** (5OEP = University Staff, FAC = Faculty, or PPP = Classified Staff).

9. Enter the **Review Rating**. (Decimal values are not allowed.)

10. Enter **Total Review Points**, if applicable. (Decimal values are not allowed.)

11. If applicable, click the **Comments** tab.

Note: If data exists on the previous row, the values for Evaluation Type, Reviewer ID, and Comments will be copied over and should be updated accordingly.

The screenshot displays the 'Comments' tab of the Employee Review interface. At the top, there are two tabs: 'Employee Review' and 'Comments'. Below the tabs, the header shows 'Employee Name' as 'Employee', 'Empl ID' as '*****', and 'Empl Record' as '0'. The main content area is divided into two sections: 'Review Details' and 'Reviewers'. The 'Review Details' section includes fields for 'Effective Date' (09/25/2017), 'Next Review Date' (12/31/2017), 'Business Unit' (USYS), 'Salary Admin Plan' (226), 'Grade' (A05), and 'Job Code' (2265, BS Prg Mgr). The 'Reviewers' section contains three fields: '*Evaluation Type' with a search icon, '*Reviewer ID' with a search icon, and a large 'Comment' text area. At the bottom of the interface, there is a row of buttons: 'Save', 'Return to Search', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'. The bottom left corner shows the breadcrumb 'Employee Review | Comments'.

12. From the **Evaluation Type**, click the look up and select the correct type for the reviewer.

13. In the **Reviewer ID** field, enter the employee ID (or click the look up to select one) of the reviewer.

14. In the **Comment** box, type any comments by the reviewer.

15. Click **Save**.