



## Performance Review

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### Overview

Annual performance reviews are a key component of employee development. The performance review is intended to be a fair and balanced assessment of an employee's performance. The objective of an annual review is to provide employees and supervisors an opportunity to:

- Discuss job performance
- Set goals for professional development
- Discuss expectations and accomplishments

Appraisals become part of an employee's personnel record and serve as documentation that the supervisor and employee completed an evaluation. These may then serve as justification to promote, demote, terminate or give raises to employees.

Using this form, supervisors are able to conduct and record performance reviews with employees. On submission, the form will be auto-assigned to the employee selected, who will then be required to review and sign the form. Subsequently, the line manager will be required to sign the form.

### Additional features

**Project Permissions:** The 'Managers' role has permission to view all performance reviews.

Please bear in mind that in a 'real life' scenario, managers may not be able to see performance reviews submitted by other managers. Modify the project permissions as needed.

| Rights                   | Project role                        |                                     |  |                                     |  |   |
|--------------------------|-------------------------------------|-------------------------------------|--|-------------------------------------|--|---|
|                          | <input type="checkbox"/> Admin      | <input type="checkbox"/> Managers   | <input type="checkbox"/> Human Resources | <input type="checkbox"/> Staff      | <input type="checkbox"/> Submitter of ticket | <input type="checkbox"/> Ticket handler |
| View tickets             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/>      | <input type="checkbox"/>            | <input checked="" type="checkbox"/>          | <input checked="" type="checkbox"/>     |
| Update tickets           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>                 | <input type="checkbox"/>            | <input checked="" type="checkbox"/>          | <input checked="" type="checkbox"/>     |
| Submit tickets           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>                 | <input type="checkbox"/>            |  |   |
| Handle tickets           | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>                 | <input checked="" type="checkbox"/> |  |   |
| Update tickets status    | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>                 | <input type="checkbox"/>            | <input type="checkbox"/>                     | <input type="checkbox"/>                |
| Assign tickets           | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>                 | <input type="checkbox"/>            | <input type="checkbox"/>                     | <input type="checkbox"/>                |
| View notes               | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/>      | <input type="checkbox"/>            | <input checked="" type="checkbox"/>          | <input checked="" type="checkbox"/>     |
| Add notes to a ticket    | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>                 | <input type="checkbox"/>            | <input checked="" type="checkbox"/>          | <input type="checkbox"/>                |
| View attached files      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/>      | <input type="checkbox"/>            | <input checked="" type="checkbox"/>          | <input checked="" type="checkbox"/>     |
| Attach files to a ticket | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>                 | <input type="checkbox"/>            | <input checked="" type="checkbox"/>          | <input type="checkbox"/>                |

The project permission 'rights' table, demonstrates that the 'managers' role can create new forms but general staff cannot.

**Field Visibility sets:** A number of advanced rules have been set up.

For example, the *employee comments* field is hidden unless one of three particular Field Conditions has been met, such as the employee has signed

the form.

| Employee Comments                  |       |       |       |      |                 |      |          |       |       |       |
|------------------------------------|-------|-------|-------|------|-----------------|------|----------|-------|-------|-------|
|                                    | All   |       | Staff |      | Human Resources |      | Managers |       | Admin |       |
| Field condition set                | View  | Edit  | View  | Edit | View            | Edit | View     | Edit  | View  | Edit  |
| = Default (Always)                 | Mixed | Mixed | Deny  | Deny | Deny            | Deny | Deny     | Deny  | Deny  | Deny  |
| = Employee Comments = Add later    | Mixed | Mixed | Allow | Deny | Allow           | Deny | Allow    | Allow | Allow | Allow |
| = Default (Being reported)         | Mixed | Mixed | Deny  | Deny | Deny            | Deny | Deny     | Deny  | Deny  | Deny  |
| = Employee Comments = Document now | Mixed | Mixed | Allow | Deny | Allow           | Deny | Allow    | Allow | Allow | Allow |
| = Employee signature = Yes         | Mixed | Mixed | Allow | Deny | Allow           | Deny | Allow    | Deny  | Allow | Allow |

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