

Performance Review - Reopen Previous Step

Immediate Supervisors have the ability to reopen previous steps in a performance review. The **Reopen Step** button appears at the bottom of the *Review Step Progression* section on the Overview page.

The screenshot displays the 'Employee Performance Review' interface for Patti Technical/Associate, with a 75% completion progress indicator. The left sidebar shows a navigation menu with sections: Overview, Section 1 - Goals, Section 2 - Core Values, Section 3 - Career Int..., Summary, and Section 4 - Signoff. The main content area includes an 'Overview' section with important instructions and a 'Review Step Progression' section. The progression steps are: Step 1 - Self Review, Step 2 - Immediate Supervisor Review, Step 3 - Immediate Supervisor Signoff (Due: 3/29/2015), and Step 4 - Employee Signoff. A 'Reopen Step' button is located at the bottom right of the progression section, and a 'Get Started' button is also visible.

- Only one review step can be reopened at a time.
- Reviewees cannot reopen a step.

Clicking the **Reopen Step** button opens a pop-up which lists all previous steps.

Reopening a step sends out the appropriate Step Assigned email notification. Also, the reopened task displays again in the appropriate user's Scheduled Tasks page and the My Tasks widget on the Welcome page.

- Select the appropriate step.
- In the Comment field, enter comments that will be sent to the person associated with the reopened step, up to 3,000 characters.
- Click **Save** to reopen the step.

For the Immediate Supervisor who reopens a previous step, their step still appears with a status of Completed.

Reopening Notes:

If a review is currently at Step 2, please make the Immediate Supervisor reopen the employee's review.

- The supervisor will then be aware that the employee will be making edits to the review.
- Before completing Step 2, the supervisor should coordinate with the employee and wait until the employee has resubmitted Step 1.

If the review is at Step 3 or Step 4, HRIS will need to reopen a previous step, however, please be careful!

- Reopening a review from Step 4 to Step 1 will allow an employee to make edits to the Self Evaluation.
- The supervisor needs to know this, and needs to review the changes made by the employee. If any negative comments are made, it will become part of the official record with the supervisor's signature on the review.

If a supervisor **signs and submits** at Step 3, there is no way for HRIS to revoke the signature later.

- The employee will see all comments, ratings, and scores, regardless if the supervisor has had the discussion with the employee.

- The employee can see supervisor comments and ratings only when the supervisor signs and submits the review at Step 3.
- If the supervisor does not complete Step 3 by August 23, the review advances to Step 4, but the employee still cannot see any supervisor ratings or inputs.
- The review would need to be reopened to Step 3 and the supervisor would need to sign and submit before the employee could see supervisor comments and ratings.