



REVIEW 2
REVIEWEE GUIDE

CONTENTS

Me page	2
The review form	3
Form users	3
Review statuses	3
The review header	3
Meeting date	5
Reviewers	6
Using your review form	8
Finalising your review content	10
Completing your review	11
Troubleshooting	12
My reviewer is incorrect	12
There is no reviewer on my form and I am not able to add one	12
I am trying to add a reviewer to my form but the person I want to add isn't listed	12
Why can't I finalise my review?	12
I have finalised/completed a review but need to make changes to my answers	12

*Due to regular product releases and enhancements,
functionality of the Simitive modules is subject to change.*

NOTE ON TERMINOLOGY



Various terms on the site can be substituted for those used within your organisation, for example you may refer to reviews as appraisals, commenters as supervisors, or workgroups as teams.

This guide will use the default terms throughout.

ME PAGE

The Review block on the Me page shows:

1. Reviews currently available for completion
2. A link to show any previous reviews that have been completed or archived

 My Reviews				
Review Title	Completion Deadline	Reviewers	Status	Next Step
Annual Review 2019	31/07/2019	Alice Admin	Shared By Reviewee	See "Why can't I finalise yet?" section of form
Annual Review	31/07/2019	Amaya Ahmed, Xavier Xander	Shared By Reviewer	See "Why can't I finalise yet?" section of form
Academic Form 2017/2018	29/09/2019	Alice Admin	Not Started	Start review
				 Hide previous reviews
Review Title	Date Completion / Archived	Reviewers	Status	
No previous reviews to display.				

Click on the review title to view the review form. Previous reviews are not editable.

When you are assigned a new review, you will receive either an action or a notification, depending on the form settings. If you have received an action, this will clear automatically once you have answered at least one question in your form.

THE REVIEW FORM

Note: Your review form may differ from the examples given here, depending on the form's template settings.

FORM USERS

There are three different types of form users:

1. **Reviewee:** The person who has been assigned the form. Reviewees can complete questions designated for the reviewee. These are labelled "Reviewee to complete".
2. **Reviewers:** The person or people who conduct the review. This would usually be the reviewee's manager. Reviewers can complete questions designated for the reviewers. These are labelled "Reviewers to complete".
3. (Not used by NDPCHS) **Commenters:** Once the reviewee and reviewer(s) have finalised the question answers, any commenters on the form will have the opportunity to view the whole form and leave a comment on it. The reviewee and reviewers will also have the chance to comment when the form is in the commenting stage.

When a form has been assigned, it is visible to the reviewee and reviewer. Commenters can only see the form content once the reviewee and reviewer have finalised it.

REVIEW STATUSES

Review forms have several statuses that they move between:

1. **Not started:** The form has not been started by the reviewee or reviewer
2. **Started:** You have saved an answer to at least one question in the review form. Answers are only visible to you until you share the form
3. **Shared:** The reviewee or reviewer has shared their answers with the other form users
4. (Not used by NDPCHS) **With commenters (dependent on form settings):** Once the reviewee and reviewers have confirmed that they do not wish to make any further changes to their answers on the form, the form content is finalised and it enters the commenting stage. Any commenters on the form are notified and can leave a comment. The reviewee and reviewer are also able to comment on the form if they wish to. Once all commenters have responded, the reviewee and reviewer confirm they wish to complete the review
5. **Completed:** The form is no longer editable, and comments are closed. Completed forms can be viewed in the **Previous reviews** section of your Me page. Forms that do not have commenters are completed as soon as the reviewee and reviewers have confirmed that they do not wish to make any further changes to the form.

Forms can also be archived at any stage before they are finalised. Archived forms appear in the **Previous reviews** section of your Me page, and are not editable.

THE REVIEW HEADER

The review header contains information about the form, and shows the steps that need to be completed before the form can be finalised. All of the boxes at the top of the form display either a

red cross icon or a green tick icon, depending on whether or not the relevant step has been completed. Any with a red cross icon will prevent the form content from being finalised.

Yolanda Yates's Review: Annual Review

Finalisation open from:

01/03/2019 1

Completion deadline:

31/07/2019 2

Status:

Shared 3

<div style="display: flex; align-items: center;"> ✘ Meeting Date </div> <p style="font-size: 0.9em;">Set a meeting date to discuss and agree this review.</p> <p style="font-size: 0.8em;">Your meeting date will need to be accepted by all reviewers on the form.</p> <div style="text-align: center; margin: 10px 0;"> 4 </div> <div style="display: flex; justify-content: center; gap: 10px;"> <div style="border: 1px solid #ccc; padding: 5px 10px; background-color: #00728f; color: white;">Set</div> <div style="border: 1px solid #ccc; padding: 5px 10px; background-color: #00728f; color: white;">Skip</div> </div>	<div style="display: flex; align-items: center;"> ✔ Reviewers </div> <p style="font-size: 0.8em;">1. Xavier Xander (default) 2. Amaya Ahmed Remove</p> <div style="text-align: center; margin: 10px 0;"> 5 </div> <div style="border: 1px solid #ccc; padding: 5px 10px; background-color: #00728f; color: white; text-align: center; margin-bottom: 5px;">Reviewer History</div> <div style="border: 1px solid #ccc; padding: 5px 10px; background-color: #00728f; color: white; text-align: center;">Add</div>	<div style="display: flex; align-items: center;"> ✔ Commenters </div> <p style="font-size: 0.8em;">1. Zach Zantus Remove</p> <div style="text-align: center; margin: 10px 0;"> 6 </div> <div style="border: 1px solid #ccc; padding: 5px 10px; background-color: #00728f; color: white; text-align: center; margin-bottom: 5px;">Commenter History</div> <div style="border: 1px solid #ccc; padding: 5px 10px; background-color: #00728f; color: white; text-align: center;">Add</div>	<div style="display: flex; align-items: center;"> ✔ Share </div> <p style="font-size: 0.8em;">You last shared this review on 19/03/2019 at 14:56.</p> <p style="font-size: 0.8em;">You can still make changes, but they will also need to be shared.</p> <p style="font-size: 0.8em;">Shared with reviewers.</p> <div style="text-align: center; margin: 10px 0;"> 7 </div>
--	---	--	--

>
Options, Attachments, & Printable PDF
8

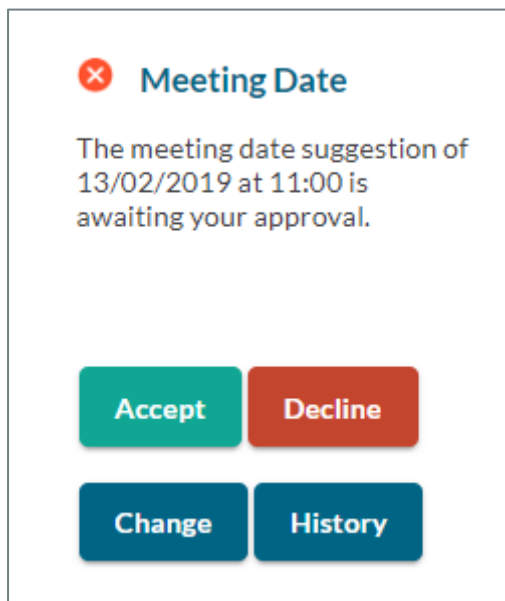
>
Why can't I finalise yet?
9

1. Date finalisation opens: Before this date, you can answer questions and share your form but will not be able to finalise the form content
2. Completion deadline: Forms not completed by this date will become overdue, and you will receive an action alerting you that you need to complete your form
3. Form status
4. Meeting date: Reviews can have a meeting where the reviewee and reviewers discuss the review. The reviewee or reviewer can propose a meeting date, and the other review participants will need to approve the date (or suggest a new one)
5. Reviewers: Anyone who is a reviewer on the form will be listed here. If the person has a star against them, this means they are listed on your employee record as your default reviewer, and have automatically been added to the review. Dependent on the review template settings you may be able to invite additional reviewers to participate in your review. Additional reviewers can be removed from the review if required
6. (Not used by NDPCHS) Commenters: Depending on the form's template settings, you may be able to add commenters who will comment on the form once the form content has been finalised. Commenters can also be removed before the form content is finalised
7. Share status: Before you share your form, your answers will only be visible to you. Sharing the form makes them visible to any reviewers. If you subsequently make changes to a shared answer, your changes will not be visible until you share the form again. Form content cannot be finalised until all changes have been shared

8. Options, attachments & printable PDF: In this section you can highlight mandatory review questions, generate a printable PDF, attach files and manage existing attachments to the form, and view keyboard shortcuts
9. Why can't I finalise yet?: There are several reasons why your review may not be able to be finalised. Expand this section to see what needs to be done before your review can be finalised

MEETING DATE

If your review requires a meeting date to be set, this can be done in the review header. Select a meeting date, time and duration (if necessary). The proposed meeting date will need to be accepted by the reviewers. Alternatively, a reviewer may suggest a meeting date that you will need to accept:



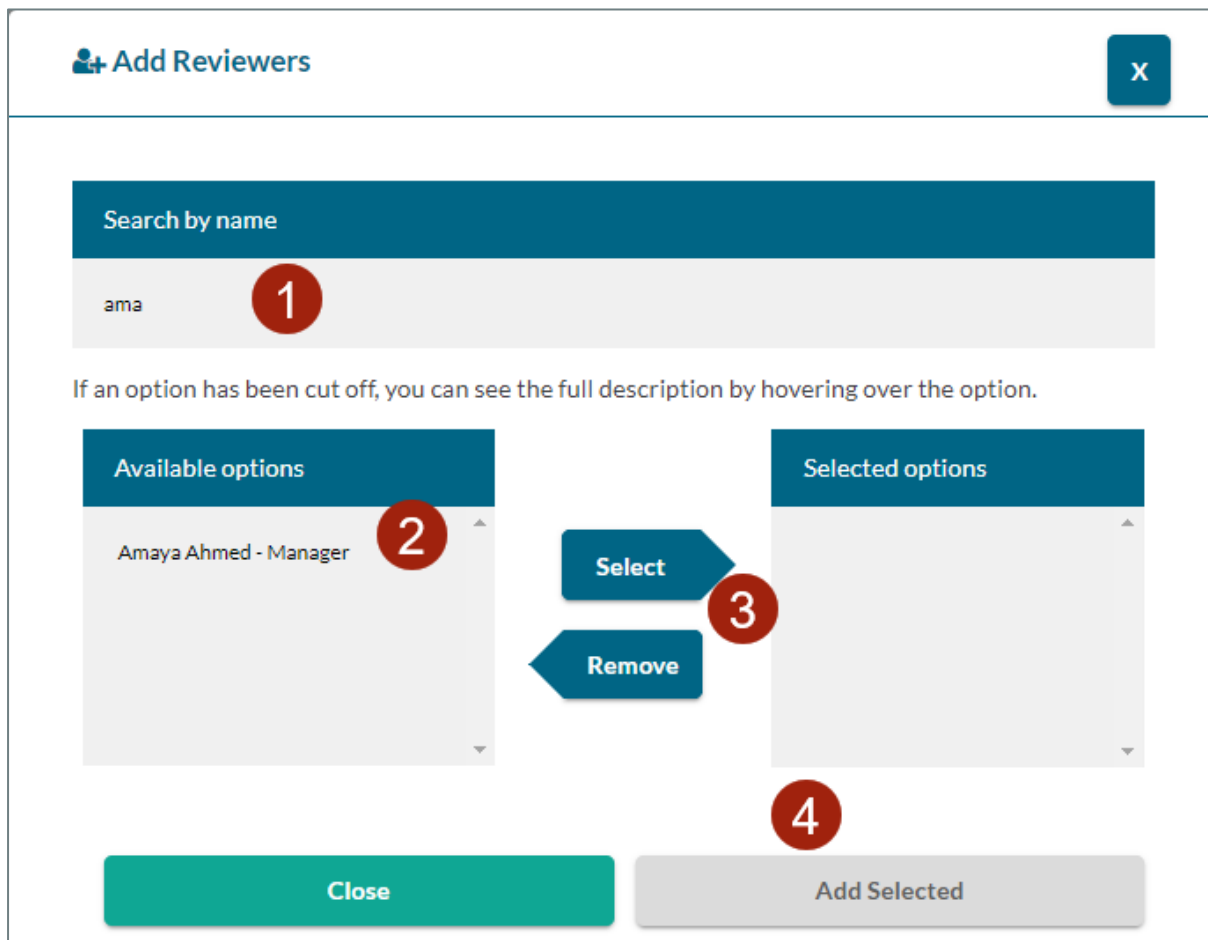
Once the meeting date has been approved by all parties, it is still possible to propose a new meeting date if necessary, using the **Change** button in the meeting date box. The new meeting date will need to be approved again. You can also view the meeting date history, which shows the dates proposed by each person, and when the meeting date was accepted.

If you have set a meeting date and time, you will be able to download a calendar file in order to add the review meeting to your calendar.

REVIEWERS

If a default reviewer is listed on your employee record, they will be added to your review automatically when it is assigned to you. Your default reviewer cannot be removed from your review.

Depending on how the form template has been set up, you may be able to add reviewers to your form:



Search by name

ama

1

If an option has been cut off, you can see the full description by hovering over the option.

Available options

Amaya Ahmed - Manager

2

Select

3

Remove

Selected options

4

Close

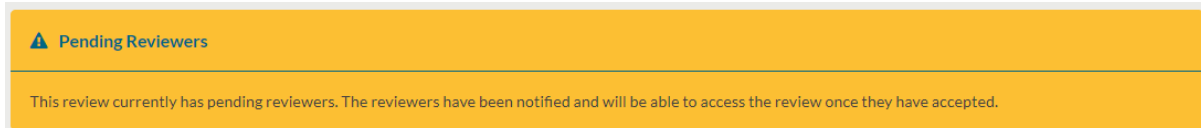
Add Selected

1. Search for a reviewer by name
2. Select the relevant person from the list
3. Click **Select** to add them to the list of selected options, or **Remove** to remove someone from the list of selected options
4. Click **Add Selected** to add the selected reviewers to your review

If reviewers need to approve being added to the form, they will be sent an action to do this. They will not appear on your form until they have accepted your reviewer request.

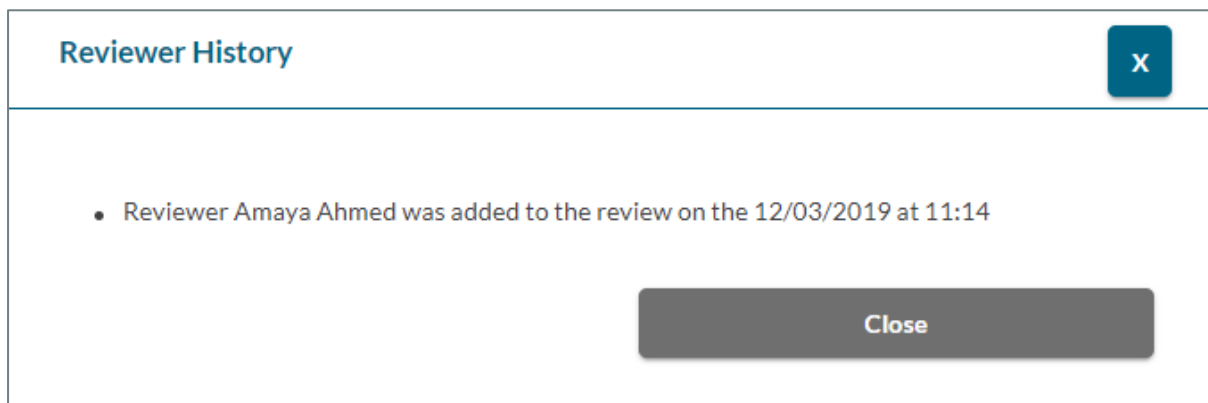
Approve reviewer request	<p>You have been added as one of the reviewers for <u>Yolanda Yates's</u> review <i>Annual Review 2019</i>. Do you want to be added as one of their reviewers?</p> <p style="text-align: right;">Decline Accept</p>
--------------------------	---

When there are outstanding reviewer requests on the form, a message will appear below the review header stating that there are pending reviewers:



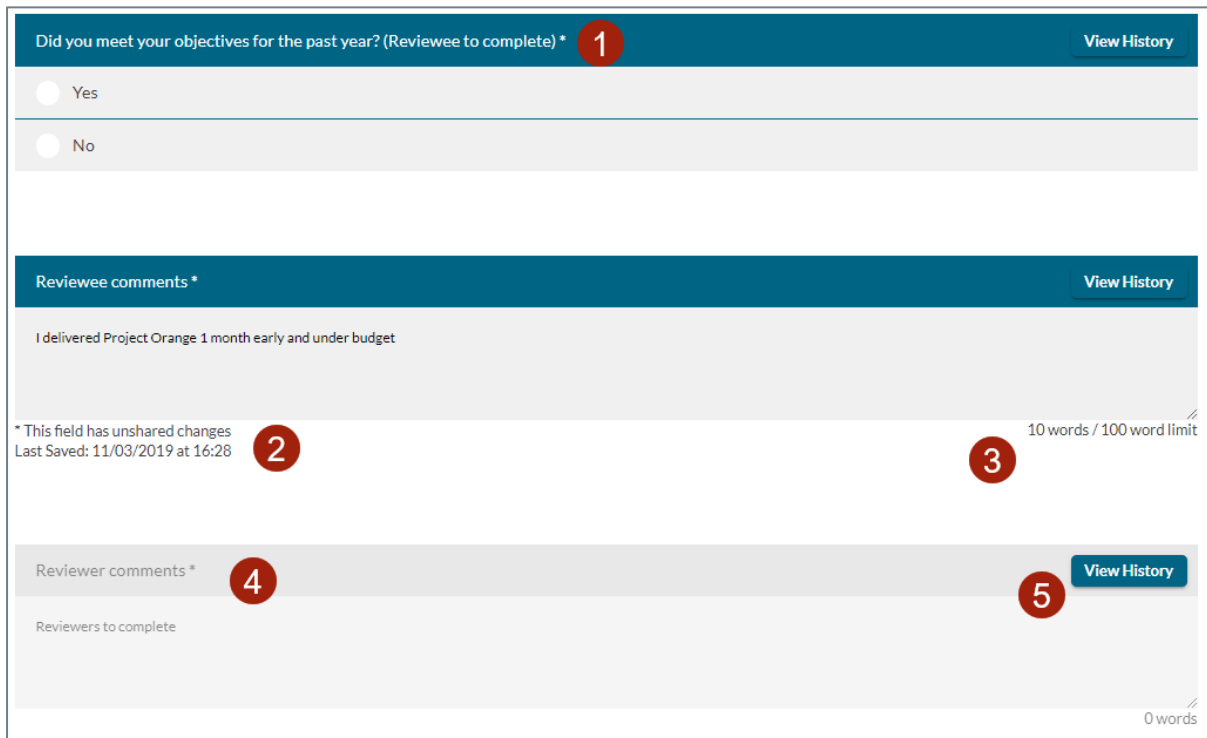
If reviewers do not need to approve the reviewer request, they will appear on your form immediately. Once added, reviewers will be able to view your review form and see any answers you have shared.

Additional reviewers can be removed from your form if necessary. Once they have been removed they will no longer be able to access your form. You can see the form's reviewer history at any time by clicking the **Reviewer History** button:



USING YOUR REVIEW FORM

Go through your form and complete the reviewee questions:



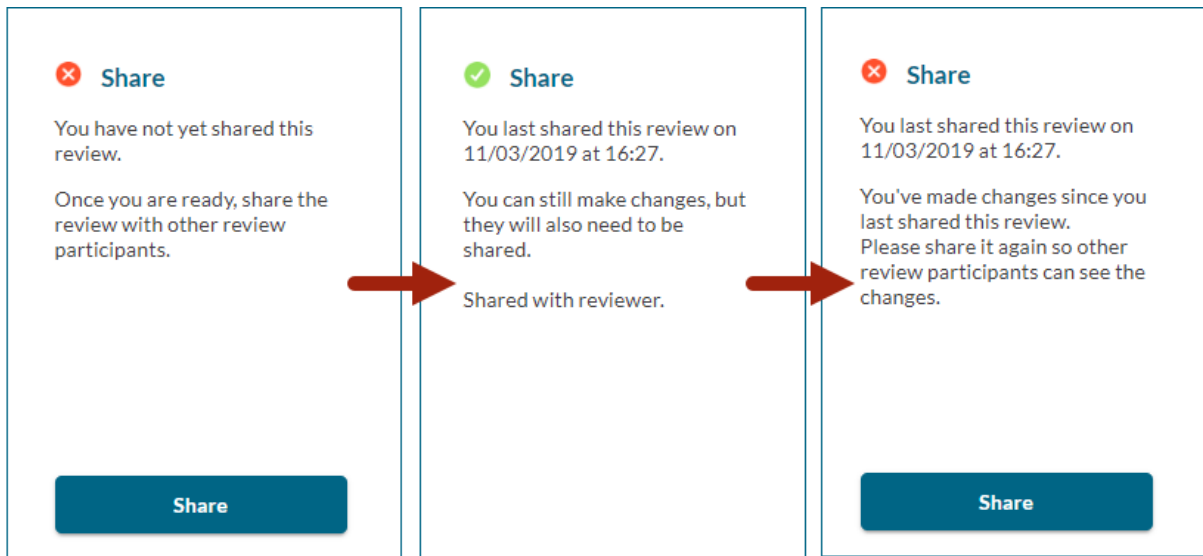
The screenshot shows a review form interface with the following elements:

- 1:** A mandatory question: "Did you meet your objectives for the past year? (Reviewee to complete) *". It has radio buttons for "Yes" and "No". A "View History" button is in the top right.
- 2:** A text input field for "Reviewee comments *". The text "I delivered Project Orange 1 month early and under budget" is entered. Below the field, it says "* This field has unshared changes" and "Last Saved: 11/03/2019 at 16:28".
- 3:** A word count indicator: "10 words / 100 word limit".
- 4:** A greyed-out section for "Reviewer comments *". It says "Reviewers to complete".
- 5:** A "View History" button in the top right of the reviewer comments section.

1. Mandatory questions are marked with an asterisk. These must all be completed before the form can be finalised. Under the **Options** you can highlight all mandatory questions
2. Information under each question updates in real time to show when the answer was last saved, and whether or not the changes have been shared with the other form users.
3. The word count is shown for text questions. There may be a word limit applied
4. Reviewer questions are greyed out and are not editable
5. The **View History** button shows the answer history for each question.

As you complete your review form, you can share your answers with your reviewers at any time. When you share your form, the reviewers will receive an action informing them you have shared your form.

The **Share** box in the review header shows the current share status of your form. If you make changes to any answers after sharing the form, it will need to be shared again before the form content can be finalised:



Your reviewers will also share their answers with you. When this happens you will receive an action:

Review shared	Xavier Xander has shared your review Annual Review 2019 . I have read the changes
---------------	---

View your form to see their answers. Fields that have changed will be marked with an exclamation point:

Reviewer comments *	View History 
Great work!	

If you are unsure what changes have been made, use the **View History** button to view the full question history and track changes:

Answer History
X

Full History

Track Changes

Xavier Xander edited this content at 12/03/2019 at 09:23
[Great work!](#)

Close

When viewing the answer history on a question that another form user has answered, only shared changes will appear in the history.

FINALISING YOUR REVIEW CONTENT

When all of the boxes in the review header show a green tick, and you and your reviewer(s) have answered and shared all of the mandatory questions on the form, the form content is ready to be finalised.

The finalisation box will appear on your form:

Finalisation

Once you have ticked this box you will not be able to make any further changes to this review. Your reviewer will be notified that you wish to finalise your review.

[View History](#)

I'm happy with the content of this review

The reviewer Xavier Xander is happy with the content of this review

The reviewer Amaya Ahmed is happy with the content of this review

Note: The wording shown on your form may be different, depending on how your site is configured.

If you wish to finalise the form's content, tick the box and confirm that you wish to finalise the form. Once you have done this you will not be able to edit the form, unless one of the reviewers declines finalisation (at which point the form will move back to the Shared status) or an administrator unfinalises the form.

Your reviewers will receive an action that you have submitted the form for finalisation and will be invited to agree finalisation. Your **Me** page will show who needs to agree finalisation of the form:

Review Title	Completion Deadline	Reviewers	Status	Next Action
Academic 2018/2019	05/04/2019	Xavier Xander	Shared	-
Performance and Development Review	-	Xavier Xander	Started	-
Annual Review 2019	31/07/2019	Amaya Ahmed, Xavier Xander	Shared	Xavier Xander and Amaya Ahmed to agree finalisation

Form participants can submit the form for finalisation in any order. If one of your reviewers submits your review for finalisation before you, you will receive an action to inform you of this:

Review submitted for finalisation

[Amaya Ahmed](#) has submitted your review [Annual Review 2019](#) for finalisation.

[Go to review](#) [Decline](#) [Approve](#)

This action will also be shown on the review form:

Review submitted for finalisation

[Amaya Ahmed](#) has submitted your review [Annual Review 2019](#) for finalisation.

Decline
Approve

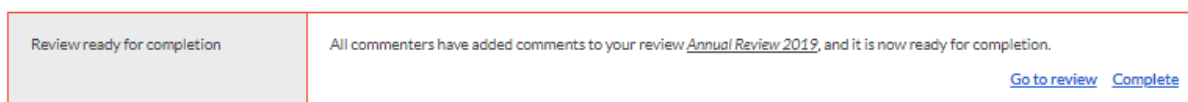
Or alternatively you can complete it by ticking to finalise within the finalisation box as above.

The finalisation history shows who has requested and accepted finalisation of the form content, and when this was done.

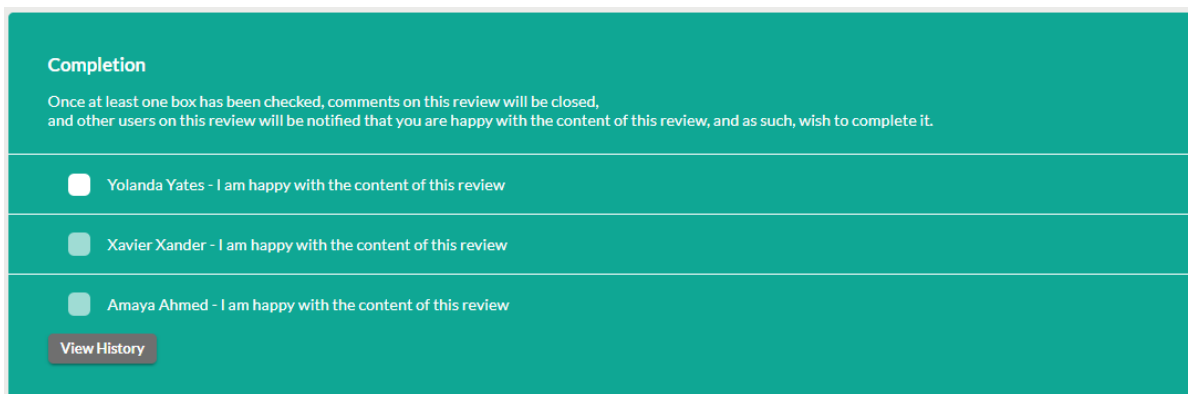
If you make further changes to the form when it has been submitted for finalisation by one of your reviewers, you will need to share your changes and all form participants will need to agree to finalise the form again. This will show in the review history as you declining to finalise the form.

COMPLETING YOUR REVIEW

Once all commenters have commented, your review will be ready for completion. You will receive an action informing you of this:



If you view your form you will see the completion box at the bottom of the form, similar to the finalisation box:



Note: The wording shown on your form may be different, depending on how your site is configured.

Tick the box to close comments on the review and confirm you wish to complete it. As with finalisation, all reviewers on the form will need to confirm they wish to complete the review.

Once everyone listed has confirmed they wish to complete the review, its status changes to **Complete** and it moves from the active reviews section of your Me page into the **Previous reviews** section.

If your form has no commenters, it skips the commenting stage and is automatically completed once all form participants have agreed to finalise the form content.

TROUBLESHOOTING

MY REVIEWER IS INCORRECT

In most cases the reviewer on your form comes from your employee record. Contact your site administrator using the **Support** link at the top right of any page if you think this information needs to be updated. Alternatively if there is an **X** next to the reviewer's name you can remove them from your review form yourself. Use the **Add** button in the Reviewers box to add another reviewer.

THERE IS NO REVIEWER ON MY FORM AND I AM NOT ABLE TO ADD ONE

This is probably because no default reviewer is listed on your employee record. Contact your site administrator using the **Support** link at the top right of any page. In the mean time you will be able to answer your questions on the form, but will not be able to share your answers until a reviewer has been added.

I AM TRYING TO ADD A REVIEWER TO MY FORM BUT THE PERSON I WANT TO ADD ISN'T LISTED

Users will not appear on the list of available reviewers if they do not have the **Reviewer** permission. Alternatively, your pool of reviewers may be limited to those in your workgroup or those above it, rather than the whole organisation. If you think there is an error, contact your site administrator using the **Support** link at the top right of any page.

WHY CAN'T I FINALISE MY REVIEW?

There are several steps that need to be completed before you can finalise your review. The **Next steps** for the review form shown on your Me page, and the **Why can't I finalise my review?** information on the review itself will help you complete the necessary steps. If there is a **Finalisation open from** date in the review header is still in the future, you will not yet be able to finalise your form content.

I HAVE FINALISED/COMPLETED A REVIEW BUT NEED TO MAKE CHANGES TO MY ANSWERS

The form will need to be uncompleted (if you need to add a comment) or unfinalised (if you need to change the form content). Contact your site admin via the **Support** link at the top right of any page.