

# IP10 - Managing annual review data

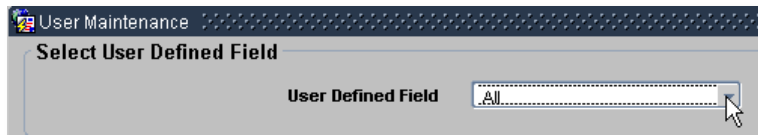
If required, annual review/PDR information can be held and maintained on an individual's appointment via the Annual Review UDF.

This guide covers the following process steps:

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## Navigate to: Personnel > Maintenance > Personal Profile


1. Search for and open the employee record and go to **Select Detail > Appointment Details**. The *Appointment Details* window opens.
2. If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted. Click the **Appointment Details** button. The *Post Appointment Maintenance* window opens.
3. Go to **Selection box > User Data**. The *User Maintenance* window opens.



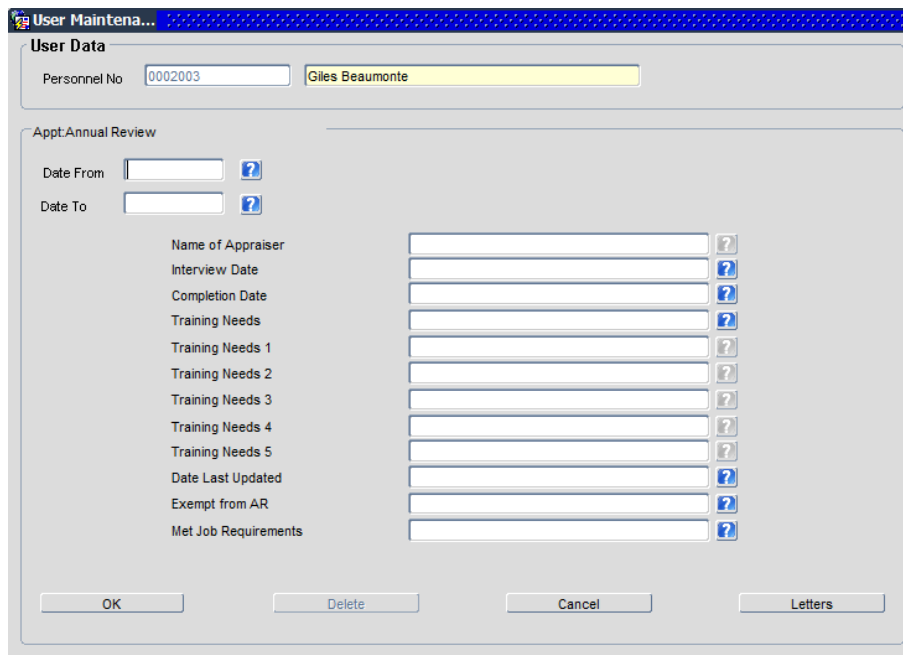
4. Click to display **User Defined Field** List of Values.
5. Select **Appt:Annual Review**.

### To create a new UDF

 **Note:** A new UDF record should be set up for each year in order for them to be tracked via the associated Annual Review report.


1. Click .

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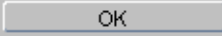

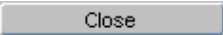


The screenshot shows a 'User Maintenance' dialog box with two main sections: 'User Data' and 'Appt: Annual Review'.  
**User Data:** Personnel No: 0002003, Name: Giles Beaumonte.  
**Appt: Annual Review:** Date From, Date To, Name of Appraiser, Interview Date, Completion Date, Training Needs, Training Needs 1-5, Date Last Updated, Exempt from AR, and Met Job Requirements. Each field has a help icon (question mark) to its right.  
 Buttons at the bottom: OK, Delete, Cancel, Letters.


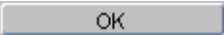

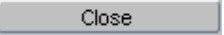
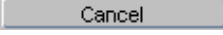
## 2. Complete the fields as necessary.

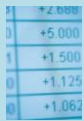
Field Name (* mandatory)	Description
<b>Date From*</b>	Enter the month the appraisal is due to take place, e.g. 1st June 2015.
<b>Date To</b>	Leave blank but see note below.
 <p><u>If appraisal details have been entered for last year you will need to enter an end date on last year's UDF record. This should be the day before the date you enter in the Date From field for this year.</u></p>	
<b>Name of Appraiser</b>	Full name of reviewer (line manager).
<b>Interview Date</b>	Date interview held (if known)
<b>Completed Date</b>	Enter date review process fully completed (i.e. date the line manager's manager signed the form).
<b>Training Needs</b>	Complete as/if required. Yes or No.
<b>Training Needs Detail 1 - 5</b>	Complete as/if required.
<b>Date Last Updated</b>	If required the date any changes have been made to the data should be entered on Core, and changed if updates are entered at a later date.
<b>Exempt from AR</b>	If the individual is exempt from the review process this can be identified here.
<b>Met Job Requirements</b>	Select (if required) Yes or No.

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3. When the relevant details have been recorded click . A 'transaction complete' message will appear. Click  then . Exit back as required.

## To update/amend existing details

1. Follow steps **1-6** as above and click on the **Appt: Annual Review** entry.
2. Select  and add details/make changes as required. Update the "Date Last Updated" field (as above) with date amendment entered on Core.
3. Click . A 'transaction complete' message will appear. Click  then . Or, to close the UDF without saving changes click . Exit back as required.



	+2.888
0	+5.000
1	+1.500
0	+1.125
0	+1.062

### Useful Report

You can output this data via: **PERDEP46\_ Annual Review Details.**

**Note:** This report will report on all your staff plus their most recent annual review record if one exists.