

SYNERGITA SOFTWARE PRIVATE LIMITED



Review Cycle Readiness - Check List

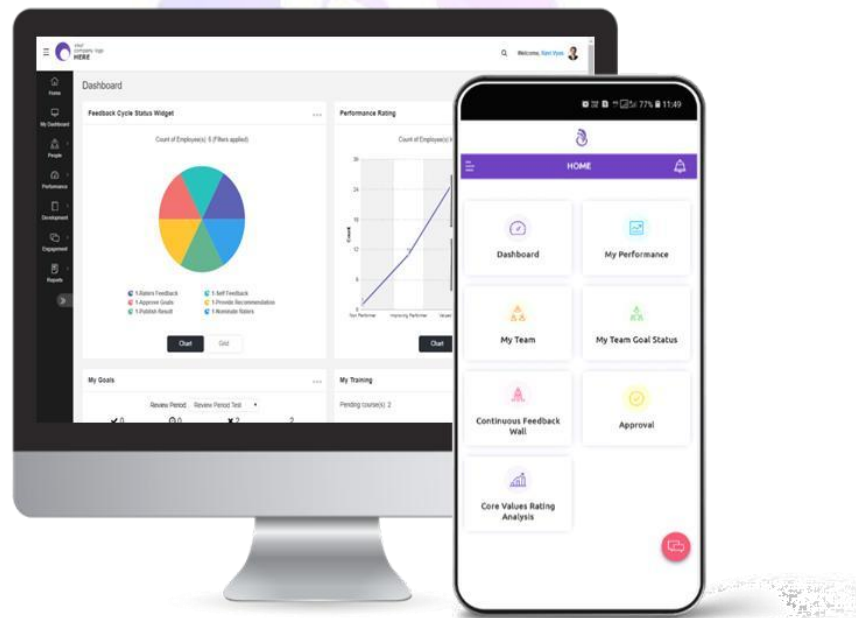


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Review Cycle Readiness Checklist

The objective of this document is to facilitate upfront preparation for the review cycles, ensuring a seamless execution of performance reviews.

Below, you'll find several checkpoints that we suggest you review before initiating the process cycle.

Verify the accuracy of employee information.

It is important to have the employee information up to-date before starting a new cycle.

Managers might have changed; people might have shifted from dept to another department, etc. If you have kept the employee data up-to-date, no issues. Else, it will be a good time to review employee details. (Addition/deletion of employee, Date of joining, designation, reporting manager, skip-level manager, department head, HRBP, etc.).

Please download employee report (**Reports -> Employee Management -> Employee Report**) to download the list of active employees, their department, designation, etc.

Employee Report

Please download “**Employee Relationship**” report. This will give the employee mapping details (Employee, Reporting manager, Reviewer, Department Head, etc.)

How to download Employee Relationship Report?

Ensure all the previous cycles are Closed/Completed

An employee can be part of one cycle at a time. The previous pending activities should be completed for the individuals to activate the review process

How to close the ongoing feedback cycle?

Review the appraisal process and workflow steps in Synergita.

Review the process flow / workflow steps before initiating the cycle. The process flow illustration can be displayed on the Home page of the system and you can discuss it with the support team to get more details.

If the process needs to be changed for any reasons, please write to support@synergita.com.

Check if your workflow needs matrix relationships (if applicable)

If your workflows need matrix relationships between employee and their managers (eg. Employee needs feedback from their primary manager, reviewer, etc.), please make sure that those matrix relationships are updated properly in employee profile.

Ideally, less number of people will fall into this category. But, it is a time consuming activity for HR to know which employees have matrix reporting and their details. Please have a process defined for this internally within your organization.

Update/Review goals, feedback forms, and templates as needed.

The feedback form will be available for Employees/Managers only if the goal setting process (Set Goals & Approve Goals) is completed for the financial year / review period. You can also initiate the goal setting process once again to make sure the goals are updated and approved before the review cycle gets started.

(OR)

Depending on certain configurations, the feedback form will only be accessible to Employees/Managers when the goals for employees have been uploaded with an approved status for the financial year/review period (if applicable).

(OR)

If the employees have the feedback template from the master forms based on the mapping logic, make sure the goals are updated from the HR Admin end before the review process cycle is initiated. (If Applicable).

Update e-mail notifications of cycle Kick off, Activity Completions and periodic reminders for the cycle

Update email notification content and recipients ("To" and "CC") based on the process flow.

Manage Notifications

How to configure notifications?

Manage the reminder set-up for the review process

How to set up activation days for reminder and escalation emails?

Enable periodic reminders by setting the Due Date and the frequency of reminder emails.

How to configure reminder due dates in manage process cycles page?

Update the Ideal Bell Curve (%) (If needed)

Update the Ideal Bell Curve (%) according to your requirement.

Through this system, HR will be able to view the idealized bell curve set at the start of the year and the superimposed actual bell curve based on the outcome of the actual outcome of the performance appraisal process.

If you would like change the ideal bell curve for the review process, our support team will help you.

Decide the dates, employee eligibility, etc..

Finalize the appraisal duration (eg. Starting Nov 1st to Dec 30th). And, decide the approximate date for various milestones like self-feedback, manager feedback, one on one meeting,

Create the new process cycle, specifying the cycle name, start date, and end date.

You can initiate a review cycle any time during the year. Please follow the solution article below to create the cycle.

[How to set up a Process Cycle?](#)

Add eligible employees into the cycle

If required, you can import eligible employees from an excel file. Prepare the list of employees to be covered in the cycle and import the employees to initiate the cycle easily. Please follow the below article to do the same.

[How to set up a Process Cycle?](#)

[How to add an employee to ongoing process cycle?](#)

Inform your managers and employees about the upcoming cycle.

Communication is critical for the success of conducting performance appraisals effectively and on time. Conduct multiple sessions for the managers to talk about the upcoming appraisals, project plan, setting expectations and best practices, etc.

Conduct Employee sessions regarding upcoming appraisals. It is important for both manager and employee to be prepared and ready.

If the appraisals are going to be done remotely, see if you can facilitate video meetings between manager and the team member.

Manage the cycle – keep an eye on the progress continuously

Once you start the cycle, kick-off notification can be sent from Synergita software.

Synergita provides performance appraisal process status, details, etc.

Synergita also sends automated reminders. Make sure that you are reviewing the progress on continuous basis. Work with various department heads to lend you helping hand in meeting your project plan.

Important reports:

- Employee Report
- Employee Feedback Status Report
- Employee Feedback Status Report by Raters
- Performance Rating and Score Report

Conclusion

Administering performance appraisal reviews is simple and easy to do through Synergita. We hope the above section has given the salient points for this.

Upfront preparation will help in making sure that you are able to execute the process well and without any glitches.

If you have any questions, please feel free to write to support@synergita.com and we will be happy to help you.

Thank you!

