

Work Instruction: Employee Review

Process: Human Resources

Process Section: 6.0

Creation Date: July 22, 2024

Revision Date:

Description of Process:

Describes the process for conducting and employee review

OBJECTIVE of Process:

The purpose for this process is to create a structured and meaningful review between employee and employer and discuss goals and how both parties derive benefit from the working relationship.

Process Boundaries:

- | | |
|------------------------|---------------------------|
| 1. Process trigger: | Scheduled review |
| 2. Process Completion: | Concluded by both parties |

Documents Located in: Odoo Knowledge & eLearning Work Instructions

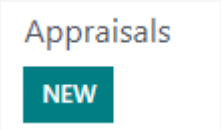
Steps:

1. **Manager** initiates a review:

1. Open Appraisals in Odoo



2. Create a new Appraisal



3. Complete Details regarding employee and select date for review meeting

0 Employee's Goals

No Meeting

Employee

e.g. John Doe

Manager

Appraisal Date ?

08/22/2024

Appraisal Date ?

08/22/2024

Department

Company

Appraisal

Skills

Private Note

Employee's Feedback

Not Visible to Manager

Manager's Feedback

Steps:

2. **Employee** will receive a request to complete their self-assessment and feedback
 1. Complete the Employee feedback page Appraisal Tab (on the left)
 2. Make it visible when ready to meet

The screenshot displays the 'Employee's Feedback' page with the 'Appraisal' tab selected. A toggle switch labeled 'Not Visible to Manager' is in the 'off' position. The page lists several functions for self-assessment, including knowledge, communication, organization, accuracy, initiative, and tool usage. A second, faded version of the page is shown to the right, with a text overlay indicating where the manager's assessment will be displayed.

Appraisal Skills

Employee's Feedback Not Visible to Manager ☐

Function

How I would describe my knowledge and technical competency in my area of responsibility?

How I would describe my ability to communicate effectively?

How would I describe my organization and time management?

What I would you say about accuracy of work and my attention to detail?

What I can you say about my ability to show initiative and take responsibility?

How do I feel about my ability to use company tools and follow and even enhance process?

Manager's Feedback

Function

Manager Assessment will show here once published

Knowledge and technical competency in my area of responsibility?

Ability to communicate effectively?

Organization and time management?

Accuracy of work and attention to detail?

Ability to show initiative and take responsibility?

Ability to use company tools and follow and even enhance process?

ESSENTIAL FUNCTIONS

MANAGER RATING 1 - 10

Technical/Product Knowledge

Steps:

3. The **Manager** will complete their portion of the review prior to meeting.
 1. Complete the Manager's feedback page on the Appraisal Tab (on the left)
 2. Make it visible when ready to meet

Appraisal	Skills	Private Note			
<div>Employee's Feedback<div>Not Visible to Manager <input type="checkbox"/></div><h3>Function</h3><p>Self Assessment will show here once published</p><p>How I would describe my knowledge and technical competency in my area of responsibility?</p><p>How I would describe my ability to communicate effectively?</p><p>How would I describe my organization and time management?</p><p>What I would you say about accuracy of work and my attention to detail?</p><p>What I can you say about my ability to show initiative and take responsibility?</p><p>How do I feel about my ability to use company tools and follow and even enhance process?</p><table border="1"><thead><tr><th>ESSENTIAL FUNCTIONS</th><th>ESSEY</th></tr></thead><tbody><tr><td>Technical/Product Knowledge</td><td></td></tr></tbody></table></div>	ESSENTIAL FUNCTIONS	ESSEY	Technical/Product Knowledge		<div>Manager's Feedback<div>Not Visible to Employee <input type="checkbox"/></div><h3>Function</h3><p>Knowledge and technical competency in area of responsibility?</p><p>Ability to communicate effectively?</p><p>Organization and time management?</p><p>Accuracy of work and attention to detail?</p><p>Ability to show initiative and take responsibility?</p><p>Ability to use company tools and follow and even enhance process?</p></div>
ESSENTIAL FUNCTIONS	ESSEY				
Technical/Product Knowledge					

Steps:

4. Manager/Employee meeting

1. Both parties will share their perspective.
2. It is helpful to have concrete examples of activity taken in the period being discussed.
3. The flow is to discuss
 1. Function> competence and effectiveness in their specific role,
 2. Core Values> these are common to all employees and to the organization,
 3. Summary should clearly identify areas of contribution and possibilities for growth, learning, improvement, and career aspirations

Revision History
