

Period Reviews

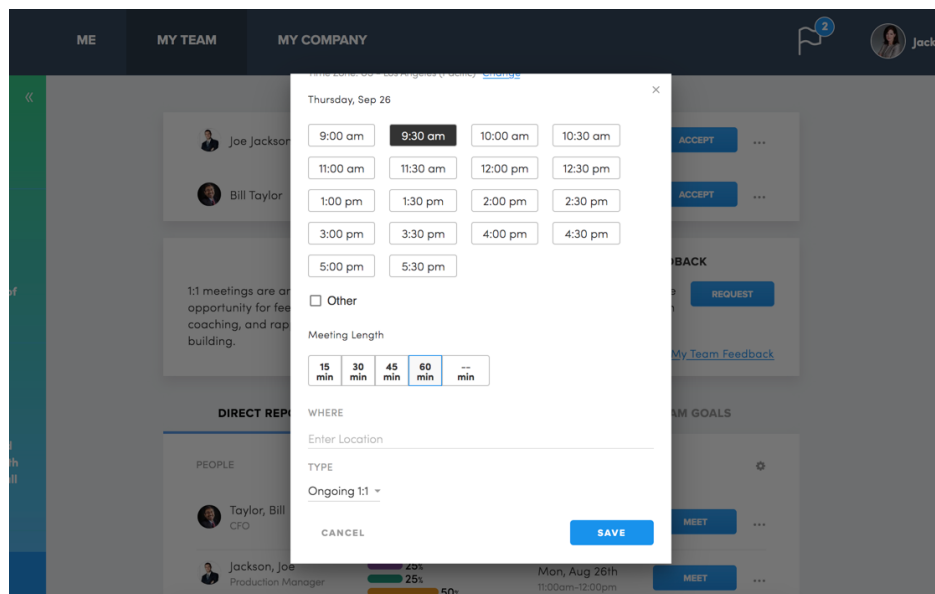
In addition to Ongoing 1:1's, you can now create End of Year Reviews to close out the year. In order to do so, you will want to create a "Period Review."

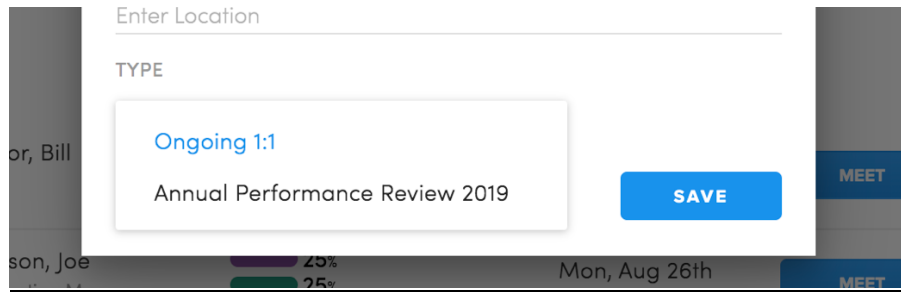
Directions to create a Period Review:

1. Log into Insights
2. Hover over your name, click "Foundation Data" under the dropdown menu
3. Click on Periods tab
4. Click on "+ Add Period" to create a new Period Review
5. Enter Nickname, for example "Annual Performance Review"
6. Enter start date (enables users to start scheduling the "Annual Performance Review" which is shown under the scheduling dropdown menu when they schedule a 1:1 meeting.)
7. Select the end date. Once the end date has pasted, users will no longer see the "Annual Performance Review" as an option on the dropdown menu when scheduling a 1:1 meeting.
8. Toggle the enable scoring to "On" so users can receive scores when they conduct their prep and 1:1 meeting.

Period Review Example

Scheduling a "Period" Review (i.e. Annual Performance Review 2019): When an employee or manager schedules a Year end Performance Review, they can select under the "Type" dropdown menu either "Ongoing 1:1" or "Annual Performance Review 2019." See screenshots below.





Screenshots of Annual Performance Review "Period Reviews":

There is a green notification (upper left side) to denote that it's a period review and not an "ongoing 1:1"

