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"
- 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.)
- 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"

C	Insights	ME	MY TEAM	MY COMPAN	IY			P ²	Jackie Waters
shoutouts «			← MY TEAM		MY TI	EAM 1:1s	MY PAST TEAM	1:1s →	
9	Jackie Waters: great job anna! An Hour Ago		Annual Per Review 201	<u>formance</u> 9		Jennifer Stephens Jackie Waters	PREP		
9	Jackie Waters: A big thank you to the Green		Thursday, 5 9:30am-10:30	Sep 26 Dam					
	Tiger team for pushing the product ahead of schedule. 23 DAYS AGO		Monday, O 4:30pm-5:30	ct 7 Sto	arbuck's	🚱 Steve Becker 🕦 Jackie Waters	PREP		
٨	Joe Jackson: Shoutout to the production & warehouse teams-all		Thursday, 0 10:30am-11:3	Det 17 Bro Dam Bro	oken Spoke	🍒 joe jackson 🐠 jackie Waters	PREP		