Talent Acquisition Cloud

Implementing Performance Review Ratings

19B

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Part Number: F16996-01

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Preface

This preface introduces information sources that can help you use the application and this guide.

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1 Understanding Review Ratings

Last Focal Review Rating and Review Rating Overview

There are two metrics used in Taleo Performance for tracking overall employee performance: Employee - Review Rating and Review - Last Focal Review Rating.

For organizations that solely want the most recent review score to be the metric that reflects employee performance, they should use Review - Last Focal Review Rating. If an organization wants to use scores from multiple focal reviews and have the score be editable throughout the year, Employee - Review Rating should be used.

The Review - Last Focal Review Rating is a static value derived from a single performance review and cannot be edited. After completing and closing a focal review, its value is stored in the historical review table and used to populate the last focal review rating in the talent profile. Focal review ratings can also be imported into the table from outside the system.
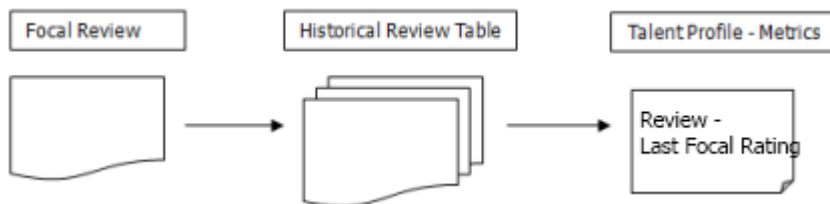
The Employee - Review Rating provides a greater degree of flexibility, in that its score can encompass multiple reviews and be manually edited from the talent profile and matrices. If you want to calibrate review scores after a review is complete, then the employee rating - making use of the same ratings model as the focal review - could be used. When used with a matrix, this rating is also better suited for indicating 'top performers' and for deciding on employee performance values with those outside of the performance review workflow process.

The values kept in the historical review table are the basis for the Employee - Review Rating, but when a focal review is closed, the values in the historical review table are copied to the employee metrics table. This enables the rating score to be modified without changing the focal review scores.
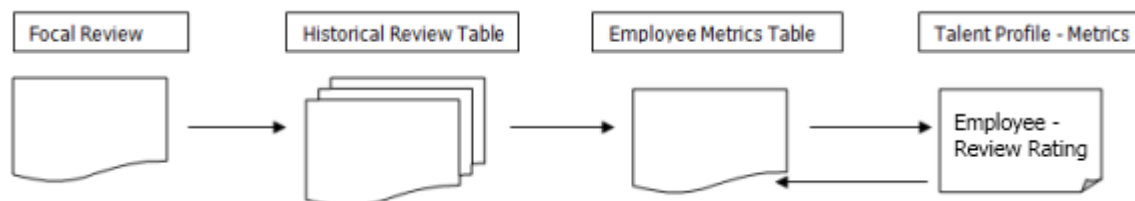
Both ratings can be used in the same implementation and when this is the case they should both use the same rating model. The labels for the settings on the Talent Profile can be customized and the ratings could be used in an instance where you want to display the most recent review score (Last Focal Review Rating) and an average review score for the past three years (Review Rating).

Non-focal review ratings are not stored in the historical review table, so ratings from a non-focal review cannot be used to display ratings in the Talent Profile.

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Working with Last Focal Review Ratings

This value is derived from the rating model that is used in the review definition for an organization's focal review.

This value comes from the Overall Rating of the employee's most recent performance review that has a status of Closed. These ratings are associated with the employee's review, not the employee themselves and cannot be edited. The rating value is stored in a historical review table and typically remains as the review rating for a calendar year. For instance, with a company that runs an Apr 1 to Mar 31 focal review period, the review rating displayed on the talent profile in January 2012, will be the result of the focal review completed on Mar 31, 2011. Even if a new review is in progress and it has a rating, until it is closed the value is not used with this setting.

Review - Last Focal Review Rating Metric

- Available in the Metrics section of the Talent Profile - Yes

- Available on Performance Card - Yes

- Available on Employee Details - Yes

- Can be set to editable (in the Talent Profile only) - No

- Always available in matrices - No

- Always available in charts, for analysis and calibration - No

To Configure Last Focal Review Rating

User permissions to access the Configuration module.

Configuration > **[Taleo Performance] Administration** > **[Performance Reviews] Review Definitions**
1. Create a review definition or select an existing one, ensuring it is deactivated or draft.
2. For the Definition Type, select Focal.
3. Click Search for Overall Rating Model and select the required rating model.

   This rating model is used to provide the value for the Review - Last Focal Review Rating score that is displayed on the Talent Profile. If you want the available values to be the same as that for Employee - Review Rating, then the model selected here must match the rating dimension selected for the review rating.

4. Click Save and activate the review definition.

   When this review definition is used for your company's reviews, it will provide the rating model for the last focal review rating.
5. Go to **Configuration** > **[Taleo Performance] Administration** > **[Employee Management] Metrics Configuration** , click Edit.
6. Select the Displayed checkboxes for Review - Last Focal Review Rating.

   This value comes directly from an employee's review and cannot be edited.

7. Click Save.

When using a review with the correct review definition, the employee's last focal review rating will be displayed on their Talent Profile.

To Set a Review - Last Focal Review Rating

Login to Taleo Performance with the appropriate user permissions and the Performance module activated.

Navigation bar > **More dropdown** > **Team Reviews**

1. As a manager, select an employee who has an active performance review.
2. Complete the review for the employee and ensure that it goes through all of the review cycle steps until it reaches the status of Closed.

   From the Overview tab for the performance review you can view the Overall Rating which is used as the last focal review rating value.

This value is used as the Last Focal Review Rating until the next focal review is completed the following year.

Working with Employee - Review Ratings

The last completed focal review and related review rating setting, along with a rating model and any subsequent user edits, make up the Employee - Review Rating.

The initial Employee - Review Rating comes from the historical review table, which holds all of the completed focal reviews and is used to populate the employee metrics table. Subsequently, any changes made by a user via the talent profile or matrix will update the rating value in the employee metrics table. Regardless of changes made to the rating value by users, the value will be reset when a new focal review is completed and closed.

The **Number of Reviews Used in Reference Review Rating** product setting controls how many closed focal reviews are used for the Employee - Review Rating score. The default value is 1, but it can be changed. For instance, if the value was 3 it would take an average of the last three focal reviews kept in the historical review table and use that for the Employee - Review Rating, which is then kept in the employee metrics table.

For example, consider the employee Julia Savard when the rating product setting is 3. At the end of the company's 2010 focal review cycle, once the focal review is closed, the Employee - Review Rating score for Julia is composed of the focal reviews for 2008, 2009, and 2010. These scores are all kept in the historical review table and when Julia's 2010 focal review is closed it triggers a recalculation of the score and updates the employee metrics table, which updates her Employee - Review Rating score appropriately. Whatever value the rating had is updated with this new score. Her manager can subsequently modify the score, buy when the 2011 focal review is closed, the tables will again be updated and the Employee - Review Rating score reset.

Employee - Review Rating Metric

- Available in the Metrics section of the Talent Profile - Yes

- Available on Performance Card - No

- Available on Employee Details - No

- Can be set to editable (in the Talent Profile only) - Yes

- Always available in matrices - Yes

- Always available in charts, for analysis and calibration - Yes

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To Configure the Employee - Review Rating

User permissions to access the Configuration module.

1. From **Configuration** > **[Taleo Performance] Administration** > **[Employee Management] Metrics Configuration** , click Edit.
2. Select the Displayed and Editable checkboxes for Employee - Review Rating.

   If you do not select Editable, the rating can only be manually changed by using a Matrix and having Employee - Review Rating as an axis dimension type.

3. Click Save.
4. From **Configuration > [Taleo Performance] Settings**, select Number of Reviews Used in Reference Review Rating and click Edit.

   This indicates how many closed focal reviews you want to use for the review rating. Each newly closed focal review leads to a recalculation of the review rating.
5. Enter how many focal reviews you want to use to determine the Employee - Review Rating or leave it as the default, and click Save.
6. Also from **Configuration > [Taleo Performance] Settings**, select 'Review Rating' Metric Rating Model and click Edit.
7. Click Search to select the Rating Dimension to use with the Review Rating, select a dimension and click Save.

   The dimensions available are the same as the rating models available for a review definition, which are the models used by Review - Last Focal Review Rating. If you want to be able to display the same values for both ratings you must use the same rating model in both places.
8. From **Configuration > [Taleo Performance] Administration > [View Modes] Matrices**, create or edit a matrix.
9. Ensure the matrix is deactivated or a draft and click Edit beside Properties and select Allow employee metric updates.

   This option enables you to update the Employee - Review Rating directly from the matrix and have that change be applied to the employee's talent profile.
10. Click Edit beside the X or Y Axis and from the Dimension Type list, select Employee - Review Rating and then ensure the number of divisions matches the number of ratings available in the rating dimension selected in step 5.

    For example, if the rating dimension values are Excellent, Good, OK, and Poor, you should have four divisions on the axis and name them accordingly. This will help users place employees in the correct cells and ensure accurate review ratings are maintained regardless of whether they are updated via the talent profile or matrix.
11. Click Save, make an other required changes to the matrix and then click Activate.

The Employee - Review Rating is now available on Talent Profiles and can be updated by using a matrix in talent pools or succession planning.

To Manually Set an Employee - Review Rating

Login to Taleo Performance with the appropriate permissions to access Talent Profiles and Matrices.

1. Select the employee's Talent Profile.
2. In the Metrics section, click Edit and select the required value from the Review Rating list in the Employee sub-section and click Save.

   The new review rating is now saved on the employee's talent profile and if you go to a matrix with Employee - Review Rating used for an axis, the employee will be positioned according to their updated rating.

3. From a talent pool or succession plan, select a matrix using Employee - Review Rating for an axis.

4. Drag an employee to a different cell and from the Options menu select Update Employee Metrics.

   You can move multiple employees and then from the Actions menu select Update Employee Metrics, updating all employees at once. Also note if the number of matrix cells do not match the number of review rating score levels, the employee's metrics might not change to the expected rating score.

Regardless of where you update the employee review rating, it is automatically updated throughout the system.

Working with Additional Review Rating Scores

Along with the two main review rating scores, there are additional scores based on the components of the performance review that can also be used.

The following settings behave the same as Employee - Review Rating:

- Employee - Competency Rating
- Employee - Goal Rating

If your system makes use of separate review sections that use Goal and Competency types, these values can be displayed as metrics in the talent profile and used in matrices. The mechanism for updating these values works like Employee - Review Rating.

The following settings, while being included with the list of metrics in the Configuration module, are used with charts when calibrating review scores:

- Review - Current Review Rating
- Review - Current Review Section Rating

These are grayed out in **[Employee Management] Metrics Configuration** to indicate that they are not available in the Talent Profile and will not be displayed there. The metrics component is used in multiple areas in the system, such as the detail metrics for charts, but their configuration has been put together in this one section with the display/edit Talent Profile options.

To Use the Review - Current Review Rating

Access to the Configuration module.

1. Go to **Configuration > [Taleo Performance] Administration > [View Modes] Charts** and select a chart.
2. Beside **Axis**, click **Edit** and select **Review - Current Review Rating** as the **Dimension Type**.

   You can also select **Review - Current Section Rating**.

3. Beside **Detail Metrics**, click **Edit** and you can select both ratings to be displayed as metrics when viewing the chart details.
4. Go to **[Performance Reviews] Performance Review Template** and click **Add** beside **Charts** to add the chart edited in the previous steps.
5. Login to Taleo Performance as a manager and go to **[Navigation bar] > More dropdown > Team Reviews**.
6. Apply **Review Cycle** and **Review Request** filters, as these are used for the review rating score.

   Review Section is used when **Review - Current Section Rating** is used as the chart axis.

7. Ensure you have selected the correct chart and then select **Show Details** and selecting a bar displays the review rating score for the employees.

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Displaying Review Ratings

How ratings are displayed in based on a combination of settings.

By combining the Metric Rating Display setting with the corresponding Metric Rating Model you can control how the ratings are displayed to the user.

You must ensure that the chosen rating display and metric rating model are compatible. For instance, a metric rating model that uses names (Poor, Average, Good) and numeric values (1, 3, 5) coupled with a metric rating display value **In text and numeric format** would display ratings such as **Average - 3**. But if you choose **In text format** and the rating model only had numeric values no value would be displayed.

The following public settings control how ratings are displayed.

Configuration > [General Configuration] Settings		
Name	Description	Values
Metric Rating Display	Indicates the display format of rating values, based on a set of predefined formats. If no option is selected, As a percentage display type will be used.	• As a percentage - Rating displayed as a normalized value • In numeric format (default) - Rating displayed as a rounded numerical value • In numeric format with rating scale - Rating displayed as a rounded numerical value with the applicable rating scale • In text format - Rating displayed as a textual rating • In text and numeric format - Rating displayed as a textual rating and a rounded numerical value
Metric Rating Model Rounding	Indicates the rounding percentage used to determine the rating value corresponding to a given score.	Numeric value between 1 and 100.
"Review Rating" Metric Rating Model	Indicates the rating model used to determine the available values for the "Employee – Review Rating" metric.	An active rating model.
"Goal Rating" Metric Rating Model	Indicates the rating model used to determine the available values for the "Employee - Goal Rating" metric.	An active rating model.
"Competency Rating" Metric Rating Model	Indicates the rating model used to determine the available values for the "Employee - Competency Rating" metric.	An active rating model.

> ✎ **Note:** Additional information on ratings, metrics, and normalized value calculations can be found in the Taleo Performance Configuration Guide.

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Consistent Display of Review Ratings

It is possible that the review rating value stored in the database can be displayed differently between the talent profile and a performance review.

As a rating's normalized score — a calculation of the actual rating expressed as a value between 0% and 100% — is stored as a floating point data type, this can occasionally lead to a single score being displayed differently in a review and a metric, when it is converted back into a real value. When there is a difference, it is typically very small, such as 3.4 compared to 3.35.

> ✏ **Note:** To ensure the identical values for the same review rating are displayed in the talent profile and performance review, you must use the same rating model for the metrics and review, the Taleo Performance setting **Number of Reviews Used in Reference Review Rating** must be **1**, and the General Configuration setting **Metric Rating Model Rounding** must match the Review Definition settings for **Number of Decimals** and **Review Definition setting Decimal Rounding Threshold**.

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