Oracle Fusion Cloud Talent Management

How do I prepare review content for a Talent Review meeting in Redwood?

FA Latest

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1 How do I prepare review content for a talent review meeting in Redwood?

Overview of Preparing Review Content in Redwood

As reviewers, you can rate your direct and indirect reports who are part of the review population before the talent review meeting. You do this on the **Prepare Review Content** page.

To prepare review content, you need to have security access to update the talent profile ratings of the person. You can update ratings until the meeting's rating submission deadline. But remember that after the meeting starts, you can't edit any ratings.

The process of preparing review content typically involves these activities:

1. *Get notification to prepare review content*.
2. *Prepare review content*.
3. *Save or submit your ratings*.

Get Notification to Prepare Review Content

When the meeting facilitator or a Talent Review super user creates and submits a talent review meeting, as a reviewer, you will receive a notification to prepare the review content.

The notification has a link to the meeting's Prepare Review Content page. Click the link to prepare review content.

How You Prepare Review Content for a Talent Review Meeting

You prepare review content on the **Prepare Review Content** page.

To view this page, do these steps:

1. Select **My Team** > **Talent Review** to open the participants' Meetings overview page.
2. Select the meeting for which you need to provide ratings.

   Note: Because of the default filters, you can only see meetings scheduled in the previous 3 months that haven’t started or are in progress on the overview page. You can clear the filters to view more meetings that you have access to.

3. From the Actions menu, select **Prepare Review Content**.

You can do these actions on the **Prepare Review Content** page:

- View the instructions provided by the meeting facilitator.

- *Check the ratings that you need to update*.
- Assign ratings and *add comments* for them.
- If adding notes has been enabled in the Talent Review meeting template, *add notes about a team member*.
- If adding tasks has been enabled in the Talent Review meeting template, *add tasks for a team member*.
- If enabled in the Talent Review meeting template and meeting configuration, *complete potential assessment for a team member*.
- *Preview the Talent Review meeting dashboard*.

Check Ratings to Update

When you view the **Prepare Review Content** page, you can see that some ratings are highlighted.

While creating the meeting, facilitators and Talent Review super users can set a data validity guideline to ensure that ratings are updated within a specified time frame. The highlighted ratings are those that haven't been updated within the data validity guideline. Review and update these ratings.

Add Rating Comments

When preparing review content on the **Prepare Review Content** page, you can add comments for each rating you assign to your team member.

1. Click the **Comments** icon in the **Comments** column.
2. In the panel, add comments to justify your ratings.
3. Click **Save and Close**.

Add Notes About Your Team Member

When preparing review content on the **Prepare Review Content** page, you can add notes about a team member if it has been enabled in the Talent Review meeting template.

Meeting facilitators and the team member can view the note if you allow them to view it.

1. Locate the team member's row in the grid.
2. Click the **Notes** icon in the **Notes** column.
3. On the **Notes** page, select the meeting for which you want to add notes. The current meeting is shown by default.
4. Click **Add Note**.

   You can see the **New note** panel.
5. Select who can see the note.
6. Create the note.
7. Click **Create**.
8. Go back to the **Prepare Review Content** page.

Add Tasks for Your Team Member

When preparing review content on the **Prepare Review Content** page, you can add tasks for your team members if it has been enabled in the Talent Review meeting template.

1. Locate the team member's row in the grid.
2. Click the **Tasks** icon in the **Tasks** column.

   You can see the Tasks page.
3. Click **Add Tasks**.
4. Add these details:

Field	Description
Subject	What the task is about.
Percentage Complete	Completion percentage
Start Date	Date when the team member starts working on the task.
End Date	Date when the team member completes working on the task.
Due Date	Date by when assignees need to complete the task. The default date is one year from the current date.
Priority	Level of urgency for the task, such as High, Medium, or Low. Priority values exist in the HRT_TASK_PRIORITY lookup. You can add values to suit your business requirements.
Status	**Assigned** or **Completed**.
Task Type	The category of the task, such as Preparation and Presentation. Task type values exist in the HRT_TASK_TYPE lookup. You can add values to suit your business requirements.
Description	A suitable description that explains the task.

5. Add assignees. These are persons who need to perform the task.

   > **Note:** The person's manager is the default assignee.

6. Add owners. These are persons who manage the task.

   > **Note:** The person adding the task is the task owner by default. Owners need not be meeting facilitators, but if the task owners can't access the Tasks page, they might not be able to manage the task.

7. Save your changes.

Complete Potential Assessment for a Team Member

When preparing review content on the **Prepare Review Content** page, you can use the potential assessment questionnaire to rate your direct and indirect reports, if it has been enabled in the Talent Review meeting template and meeting configuration.

1. Locate the team member's row in the grid.
2. Click the **Potential Assessment** icon in the **Potential Assessment** column.

   You can see the **Potential assessment** panel.
3. Select an appropriate option for all the questions. Add comments about the rating you've given for questions that have comments enabled.
4. Click **View Potential Rating**.

   You can see the potential rating and assessment score for the employee.
5. Click **Save and Close** if you want to retain the rating. Else, you can reassess by changing your responses.

Preview Meeting Dashboard When Preparing Review Content

When preparing review content, you can preview the Talent Review dashboard to see where your direct and indirect reports appear in the box chart matrix.

On the Prepare Review Content page, click **View Dashboard** to open a preview of the Talent Review dashboard. You can do these actions on the dashboard:

- Move your reports on the box chart. You can see their updated ratings on the Prepare Review Content page.
- View succession plans and talent pools for which you're an owner if they're added by facilitators when they create the meeting.
- Create additional succession plans or talent pools. You can do this only if you have the security permission to create succession plans and talent pools.
- Perform many other actions that are available on the dashboard during the meeting. For example, you can create tasks and notes, and add goals for your reports.

Save or Submit Ratings

You can either save or submit ratings on the **Prepare Review Content** page.

- When you save, the edited ratings are saved, but the employee profile isn't updated. Facilitators and Talent Review super users can't see the updated ratings on the Talent Review meeting dashboard. You can return to the **Prepare Review Content** page and continue editing ratings until the meeting starts or until the submission deadline.
- Here's what happens when you submit the ratings:
  - The employee profile is updated with the edited ratings. The rating source is set to **Talent Review Meeting Preparation** in the profiles tables.

- If your administrator has configured the submission process threshold in the meeting template and if the number of employees rated by the reviewer exceeds or is equal to the submission process threshold, a scheduled process is automatically run to update the profile ratings.

  > **Note:** Configuring the submission process threshold in the meeting template is optional.

- Facilitators and Talent Review super users can see the updated ratings on the Talent Review meeting dashboard.