

# CIPHR HR 9.4 release notes – 9.4.3

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## NEW FEATURES

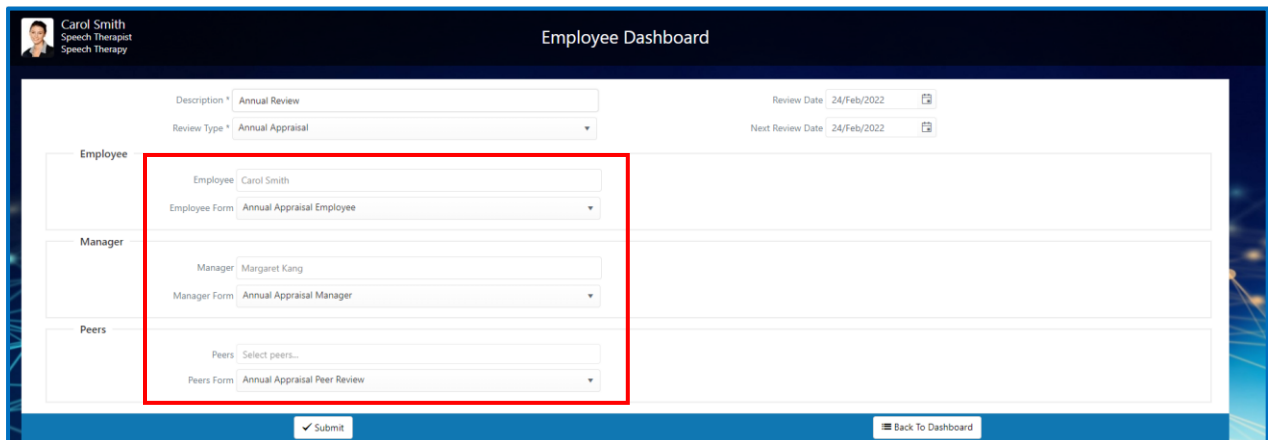
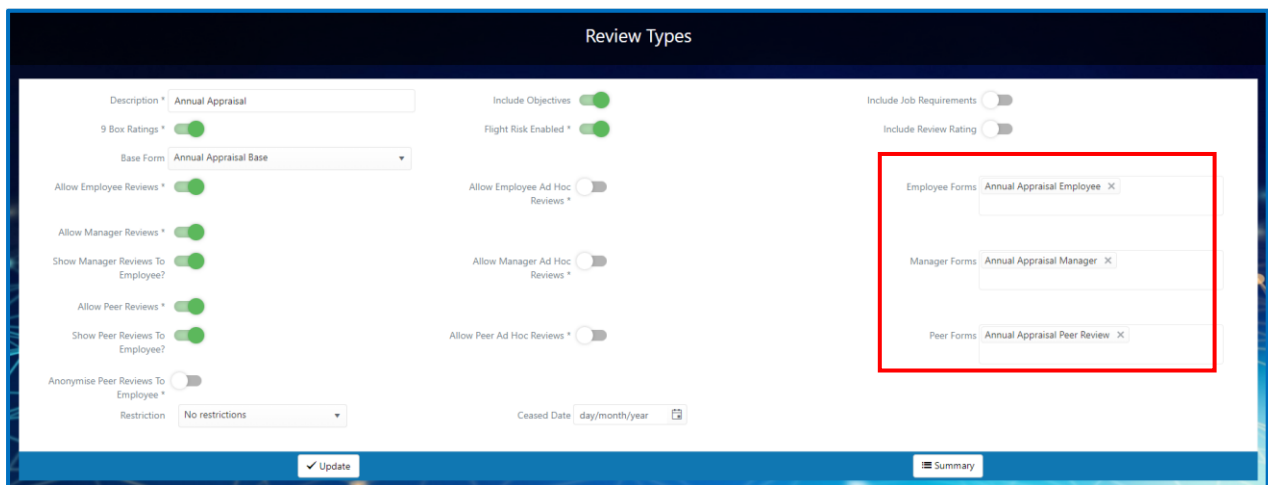
There are a number of recent updates to functionality included in this version and 9.4.2. Please refer to the **9.4.2 Release Notes on CIPHR Academy** for further details on that version.

### Talent Management Fundamentals standard module

There are multiple new features in the standard functionality available to all customers, as detailed below.

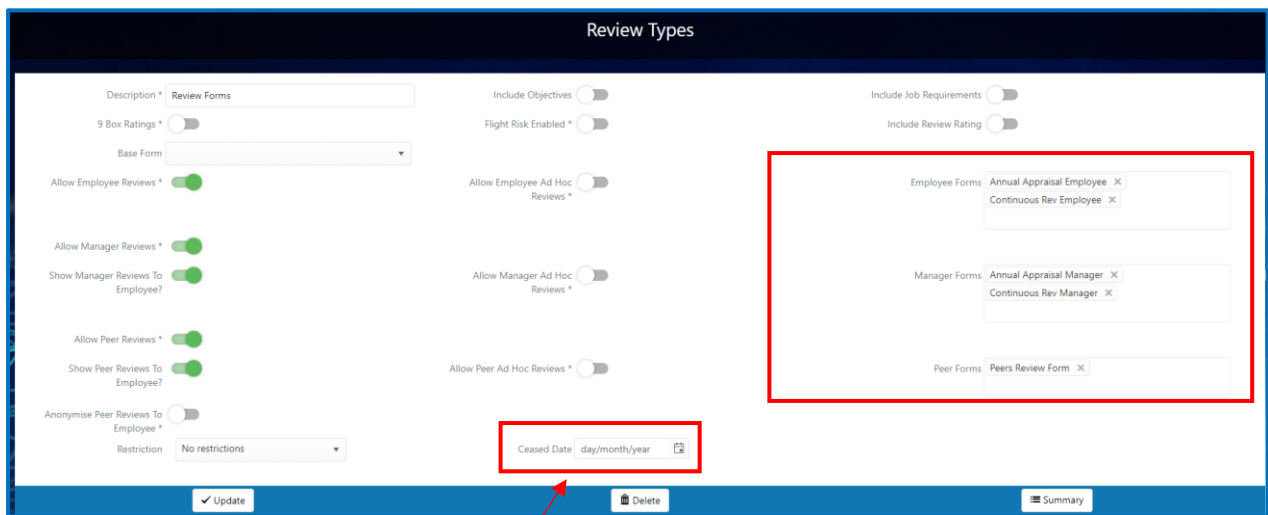
#### Mandatory form selection

When configuring your review template via **System> Talent Management Configuration> Review Types**, if you select one review form for each reviewer (Employee/Manager/Peer) as shown below, these forms will now auto-populate the form selection box when a review type is created on an individual employee’s record, via the Employee Dashboard.



**Note:** the peer form remains optional so where the form choice may be auto-populated, if no peer names are selected it will create the review without this peer form.

If you attach more than one form for each reviewer to give them a choice of forms for different processes, (such as where you may be limited to one review type with the standard Talent Management Fundamentals module) then the forms won't auto-populate so when inserting the review, the user can select the relevant forms as required.



### Review Type Cease Date

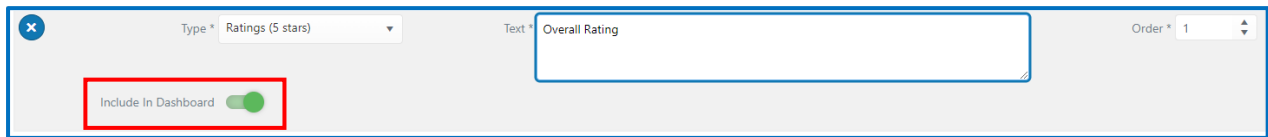
There is now the option to pick a cease date in a review type to prevent the template from appearing in the drop-down selection for users in the Employee Dashboard.

The form will disappear from selection on the cease date, so for example if using the cease date in line with a deadline for your annual reviews, select the day after your deadline, at which point the form will no longer be available. Any existing reviews of this type stored on employees' records will be unaffected by the cease date.

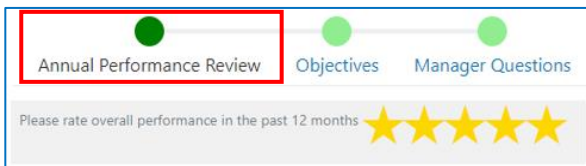
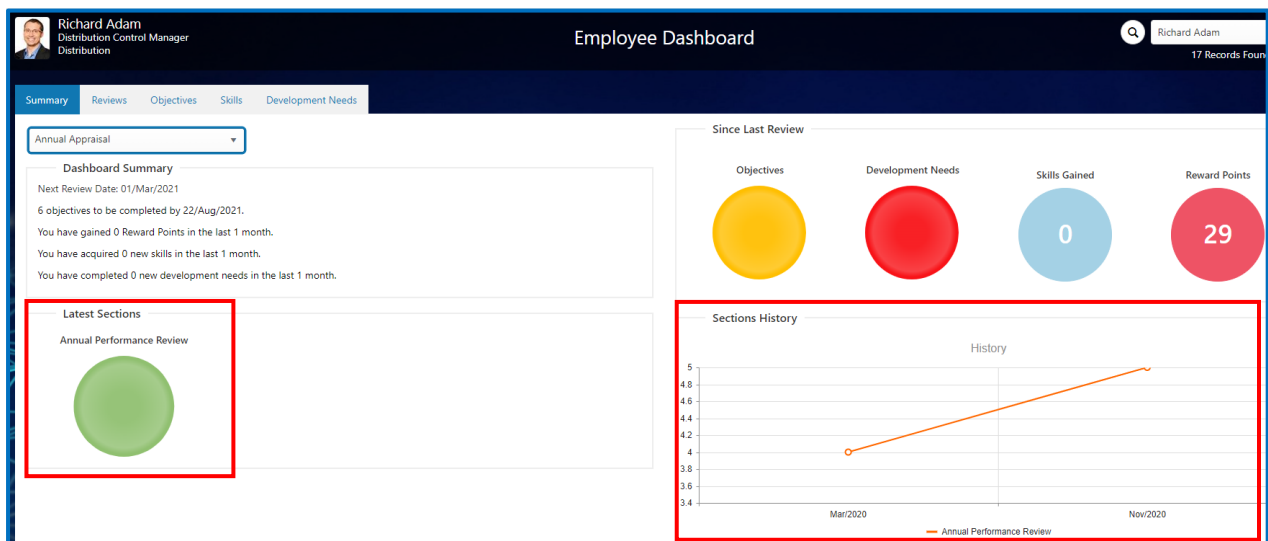
### Rated Questions in the Employee Dashboard Summary

Rated questions can now be enabled to ‘include in Dashboard’ without the requirement for a base form in the Review Type template.

This applies to 1-5 style rated questions (Ratings, Ranges or Stars).



Where the toggle is enabled, when the question is answered, the score will appear on the Employee Dashboard Summary.



Ratings will display with the Form Section Header name in the key, and if there is more than one rated question per section, then it will display an average of the scores.

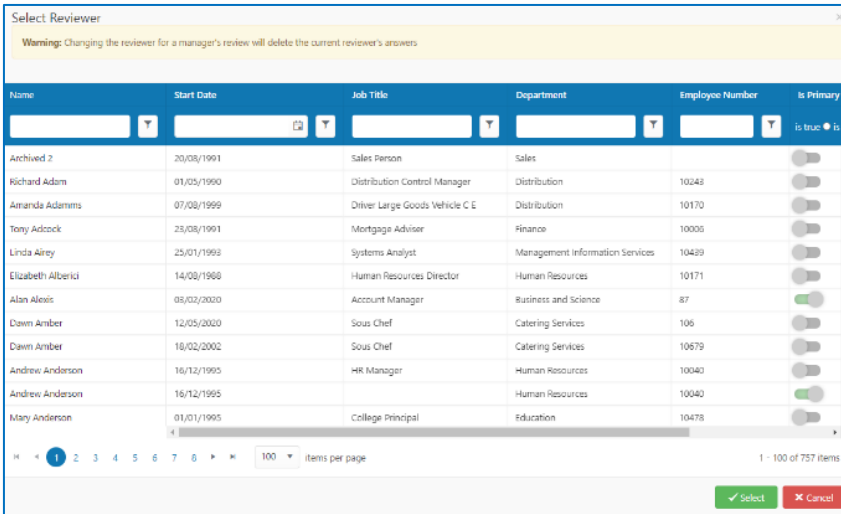
### Change Manager During a Review

It's now possible for **system administrators (licence required)** to change a manager during a review process. This means reviews can now also be inserted without a manager, to then be added later. The message below will show instead of a manager name if the employee does not report to anyone.

To add a new manager to a review, a **system administrator** can access the specific review via the **Employee Dashboard > Reviews Tab**. Click on the relevant review and then into the manager form.

Creation Date	Description	Next Review Date	Reviewer Name	Reviewer Type	Potential	Performance	Signed Off	Company Values	Overall Performance
25 Feb 2022	Annual Review 2022	24 Feb 2023	Rita Carrington	Employee	N/A	N/A	⊗	●	●
25 Feb 2022	Annual Review 2022	24 Feb 2023		Manager			⊗	●	●

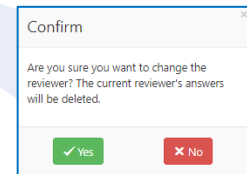
A **Change Manager** button is visible for system administrators which will present a full staff list to select a new manager.



**Note:** You can select the new manager from the list but they must have subordinate access to the employee through the hierarchy, and be in an appropriate user role, otherwise they will not be able to access the record.

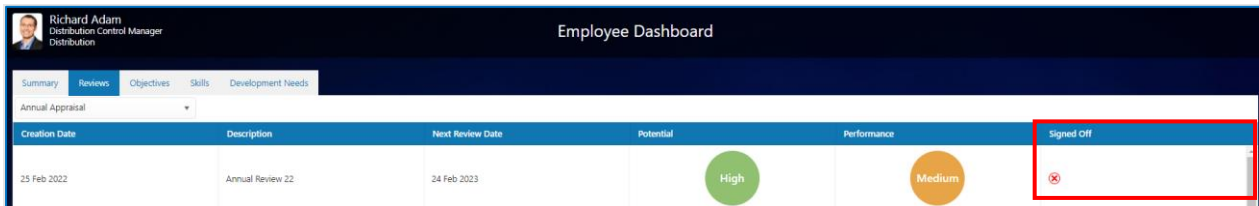
**Warning:** the yellow banner warns that amending the manager will wipe any previous manager answers.

A further confirmation box will also highlight this before you commit the change.



### Improved visibility of which reviews have been signed off

You can now review sign off status at a glance through the Employee Dashboard. In the Reviews tab summary you can see if the overall review is signed off.



Click into the relevant review to see which reviewer forms are completed.

Creation Date	Description	Next Review Date	Reviewer Name	Reviewer Type	Potential	Performance	Signed Off
25 Feb 2022	Annual Review 22	24 Feb 2023	Richard Adam	Employee	N/A	N/A	✓
25 Feb 2022	Annual Review 22	24 Feb 2023	Paul Green	Manager	High	Medium	✗

100 items per page

✗ Delete Review ✗ Close Review

### Close Review

**System Administrators (licence required)** can now close unfinished reviews, for example where an employee has left and is unable to complete it. A button will show when clicking into the review in the **Employee Dashboard**.

A warning box will pop up to confirm you wish to close the review. Clicking **Yes** will then fully sign off the review.

Confirm Close Review ✗

Are you sure you want to close the review?

✓ Yes
✗ No

### Bulk Talent Management Review Ratings via the Pay Proposal/Review Tools

Review ratings can now be proposed in bulk as part of a pay review without having to complete a Talent Management Review.

Managers can submit proposals in the usual way via **Management > Pay Proposals** but there are additional columns as detailed below.

Details	Pay Basis	Grade	Basic Pay	Current Review ...	Proposed Basic ...	Review Date	Increase Amount	Increase Percent...	Proposed Review...
Richard Adam Distribution Control Manager Distribution	Annual	Grade 7	£ 40,000.00	Excellent - ready for promotion					Update Cancel
Ian Baatz Despatch Shift Leader Distribution	Annual	Grade 4	£ 19,641.00						Excellent - ready for promotion Very Good - promotion possible Above average Satisfactory Poor performer Edit
William Beecher Despatcher Distribution	Annual	Grade 2	£ 18,244.00						Edit
Steve Cox Despatch Supervisor Distribution	Annual	Grade 4	£ 23,442.00						Edit
Jo Duffield Warehouse Supervisor Distribution	Annual	Grade 4	£ 35,378.00	Satisfactory					Edit
			<b>488,364.00</b>						

- ✓ The Photo, Name, Job Title and Org Unit 1 fields have been combined into a single column displayed on the left hand side of the page
- ✓ A new **Current Review Rating** column will show the review rating (if enabled) from the employee’s latest signed off Talent Management Review
- ✓ A new **Proposed Review Rating** column allows the user to enter proposed ratings in bulk, which can also be exported/imported
- ✓ Multi Entity is applied if enabled
- ✓ Employees with a proposed review rating selected, will have a new signed off review created against their record under the new **Performance Review** Type, when the pay review updates are submitted.

**Note:** Review ratings submitted from Talent Management do not currently link to the pay increase percentages in the Review Ratings code table. To use this functionality, pay reviews must be submitted via the **Employee Relations** area. For more details on **pay/salary review** functionality, please refer to the information pages available on CIPHR Academy.

### Talent Management (Full Module Only) Review Form Objectives

Within the full Talent Management module, objectives can be included in the review type, to add them to the end of the workflow within an employee/manager review form.

There are now several enhancements to this area within the **Review Form** configuration. Configuration is accessed via **System > Talent Management Configuration > Review Forms**.

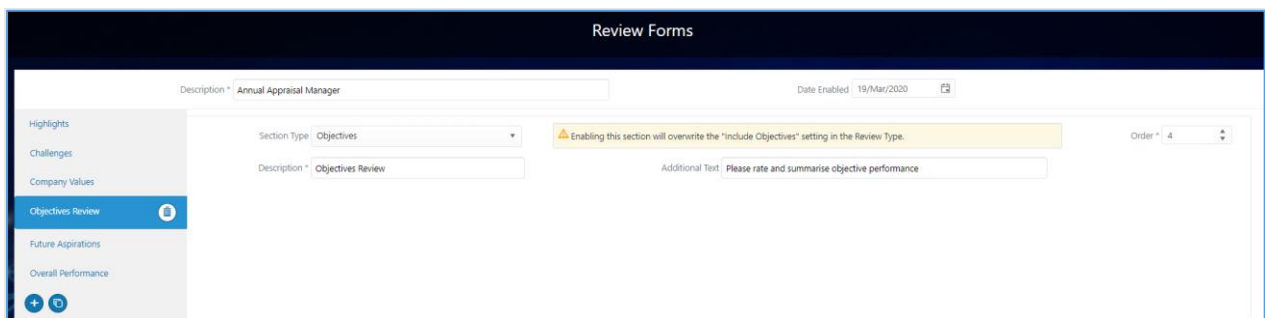
When creating a section in the form, three options are presented in a drop-down list:

#### Standard Type

This is the original configurable form section and works in the same way as usual.

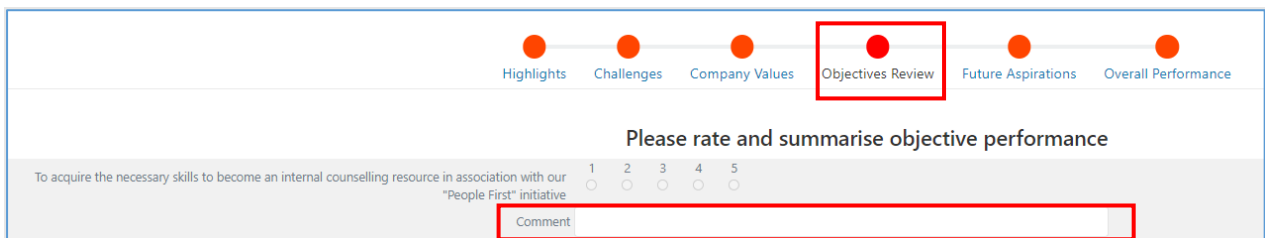
### Objectives Type

This type overrides the "Include Objectives" switch configured in the Review Type shown on the previous page and will therefore appear even if the switch is disabled. A warning is shown in the yellow bar in the image below.



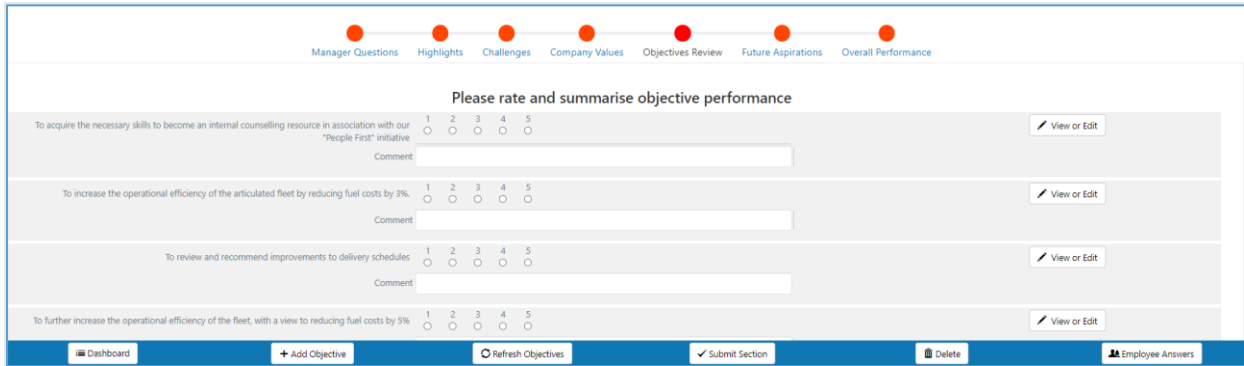
The section will look similar to using the **Include Objectives** switch, but is enhanced by:

- ✓ You can add comments below each objective
- ✓ You can tailor the section header name
- ✓ You can tailor the additional text heading, rather than the standard heading of “How have these objectives gone?”
- ✓ You can choose where the section appears in the workflow, rather than at the end

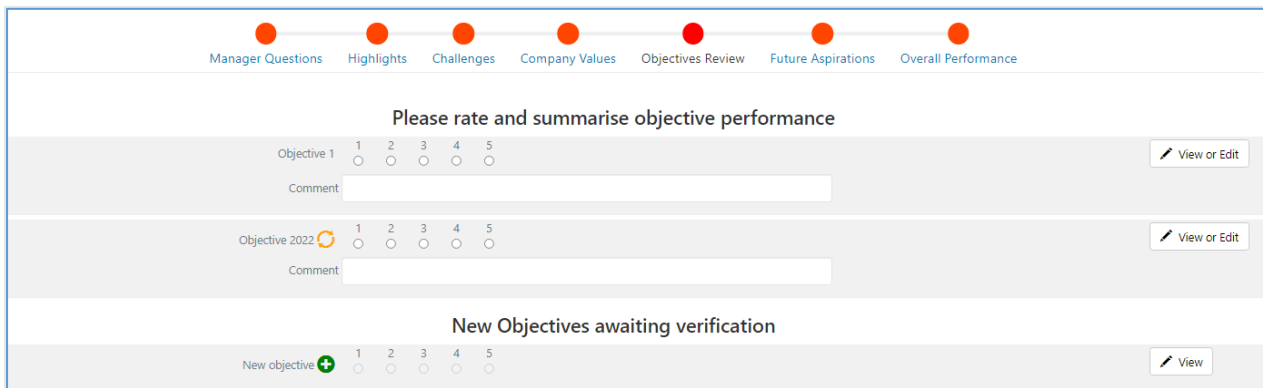


### Enhanced Objective Type

This type does everything the "Objective Type" does with the additional features below, shown within the review section:



- ✓ Each objective has a **View or Edit** button to the right, which takes the user to the Objectives details page for the relevant objective
- ✓ The button bar will show an **Add Objective** button which will take them to a blank objectives creation page
- ✓ Updating/Creating objectives through these buttons will take the user back to the review form after clicking the **Update** button
- ✓ Users will be able to navigate back to the review through the **Back to Review** button
- ✓ Access to the buttons will depend on the user's permission to the Objectives page and having write access to the review
- ✓ Verification statuses are shown next to each objective awaiting verification using the same icons from the Verification page, such as an employee adding/updating their objective(s) which requires manager approval
- ✓ New objectives will appear at the bottom of the page under a separate heading.



The manager can click **View or Edit** to go into the Objective detail and approve/decline as normal.

## EXISTING FUNCTIONALITY ENHANCEMENTS AND FIXES

### Associated Ticket

### Area

#### Absence

PROD-2182	- Absence Summary Totals: Field Group Security can now be applied to fields on this page
N/A	- Holiday Pro Rata Tool: Calculation process can be run on the last day of the holiday year
PROD-1570	- Holiday Pro Rata Adjustment now separate for primary/secondary records
N/A	- Team Who's Off grid enhanced view for HR users to show employees with no Job and Pay records

#### Jobs

PROD-1096	- Job Requirements/Occupants: improved search performance
PROD-2101	- Jobs: current job occupants filter removes previous occupants
PROD-1045	- Cost Centres: improved search performance

#### Talent and Development

PROD-925	- Skills Tab in Employee Dashboard no longer shows insert button where access is read only
PROD-1533	- Talent Review form comments box appears at the bottom of the section
N/A	- Event Management Delegates page improvements to correctly delete associated qualifications and populate the venue field when a record is selected
PROD-1691	- Performance Reviews (Archive): Leaver records now accessible
PROD-2165	- Talent Management Review Type: Next review date can now be backdated to before the individual review creation date

#### Improved Alert Messaging

N/A	- Spine update failure
PROD-1690	- Reports timeout

Associated Ticket	Area
	<b>Multi-Level Verification</b>
PROD-1738	- Improved performance to prevent HR User updating own record where approval is required
N/A	- Verification Approval Notes are more informative
PROD-2152	- Job and Pay verification: Currency and spine point present correctly
	<b>General</b>
N/A	- Record Group Security: Roles with access to all record groups will now automatically see employees in a newly added record group
PROD-1741	- 'Reports to' Manager Name field updates when manager leaves
PROD-1469	- Leaver Wizard removes future records as expected
PROD-1577	- Re-employment Wizard: rehired employees can now use Single Sign On without having to manually remove former leaver record email address
PROD-1752	- Employee Additional Information: summary grid now displays numeric picklist correctly
PROD-2104	- Languages: 'Single Central Register Key' text is now translatable
PROD-788	- Primary/secondary roles now link policy acceptance
N/A	- Kudos Reward Points: improved filtering by Date Awarded in Employee Directory and Reward Points Leader board
PROD-375	Improved styling on Single Sign-On logged out page
	<b>Additional Modules</b>
	<b>Case Management</b>
PROD-929	- Further Information Fields can now be separated on tabs as required
PROD-997	- Improved access toggles
	<b>iRecruit</b>
PROD-2200	- ATS Candidate Importer: now sends job title/job code

## SUPPORT

For more details on functionality refer to the information pages available on CIPHR Academy.