



Review Task Central

Starter Guide

Make Reviews more efficient and effective by centralizing all activities for a performance review in one place.



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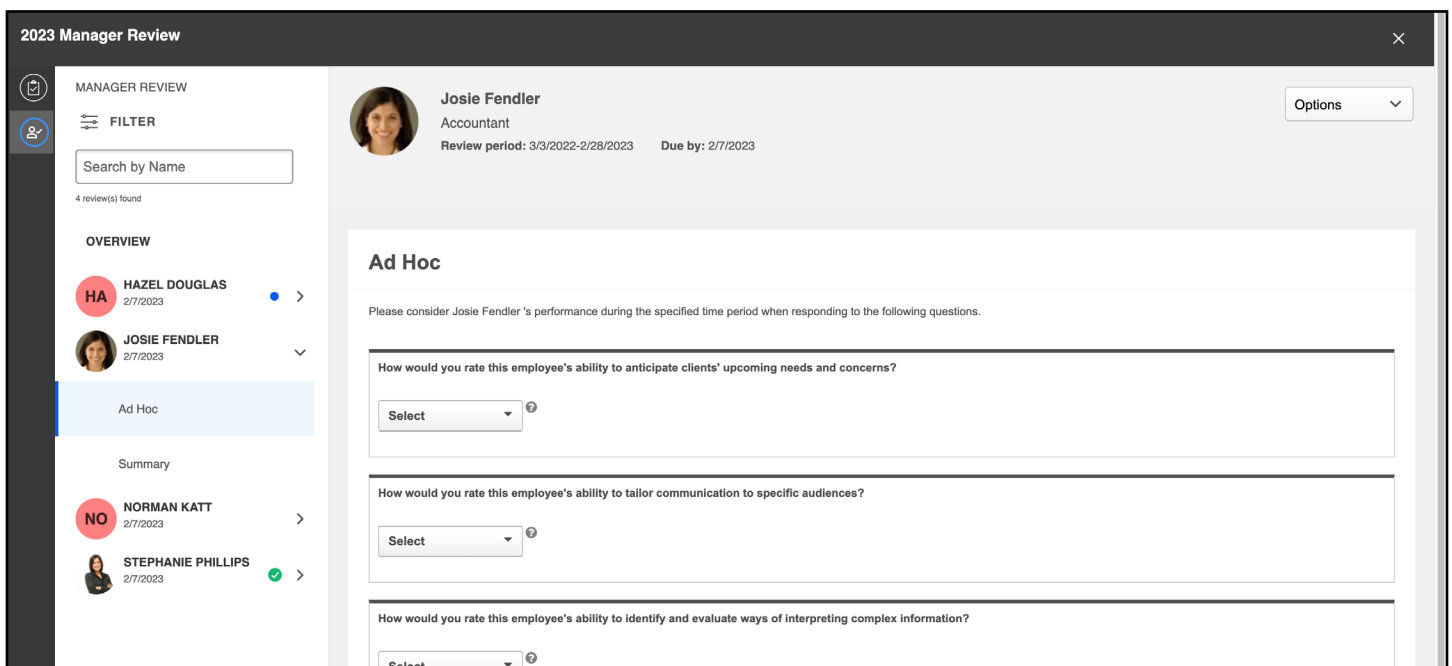
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Creating a simpler review process

Performance reviews can often be cumbersome and confusing for employees and managers to complete. Reviewers need an easy way to view, submit, and informally calibrate all the steps they have been assigned in a review task. This will allow reviewers and employees to focus on the content of the review and reduce the time spent by administrators answering questions about the review process and system.

Review Task Central provides a modern user experience for performance reviews that combines all assigned performance review steps into one view.

Reviewers can access and work on all assigned review steps in one place, making the review process more effective and efficient for managers, allowing them to see which reviews are outstanding. Clearer navigation and fewer clicks reduce the number of questions administrators receive.



The screenshot displays the '2023 Manager Review' interface. On the left, a sidebar shows a list of reviewees: HAZEL DOUGLAS (HA), JOSIE FENDLER, NORMAN KATT (NO), and STEPHANIE PHILLIPS. The 'Ad Hoc' review step for Josie Fendler is selected. The main content area shows the 'Ad Hoc' review form for Josie Fendler, an Accountant, with a review period from 3/3/2022 to 2/28/2023 and a due date of 2/7/2023. The form includes three questions, each with a 'Select' dropdown menu:

- How would you rate this employee's ability to anticipate clients' upcoming needs and concerns?
- How would you rate this employee's ability to tailor communication to specific audiences?
- How would you rate this employee's ability to identify and evaluate ways of interpreting complex information?

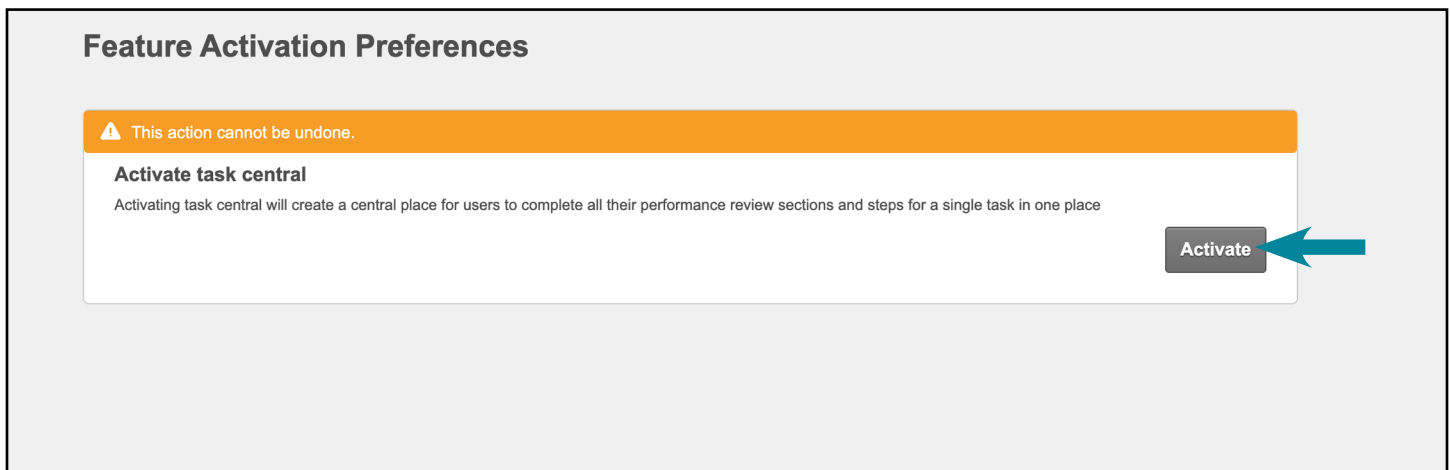
Spotlight on Review Task Central:

- An improved user interface
- Access and work on each step of the review in one location
- Filter review step-by-step status
- Search reviewee list by reviewee name
- View previous off-cycle tasks in a single view

Getting started

Enablement

Following the April 14 patch, Review Task Central can be enabled in Stage, Pilot, and Production using a new Feature Activation page (Admin > Tools > Performance Management). At the bottom of the page, you'll find the **Activate task central** button.



Once enabled, all newly created tasks will use the new interface.

Tasks that were created prior will still use the legacy reviews experience.

Tasks created after activation will be noted with a **green check** next to their name in Task Administration.

The screenshot shows the Task Administration interface. At the top, there are two checkboxes: 'Show completed/expired' (unchecked) and 'Display Off Cycle Tasks' (checked). Below this is a table with two columns: 'Name' and 'Description'. The first row has a green checkmark next to '2023 Manager Review' and the description 'Review Task fo'. The second row has 'Client Project Review' and the description 'This is an off-cy performance ba'. The third row has 'Off-Cycle Performance Review' and the description 'This is an off-cy performance ba'.

Name	Description
✓ 2023 Manager Review	Review Task fo
Client Project Review	This is an off-cy performance ba
Off-Cycle Performance Review	This is an off-cy performance ba

Permission

The **Performance Features Self Activation** permission grants access to the Feature Activation Preferences page, where an administrator can activate new features associated with Performance.

Considerations


- Cornerstone recommends that this feature first be **tested in either the Stage or Pilot** environments.
- Once activated, **Review Task Central CANNOT be turned off.**
- Task Central allows reviewers to review multiple users at once using a single platform. However, it can only display 1,000 users to a reviewer at a time.
- Tasks created after Task Central is enabled cannot use the Confirmation Page, this option is greyed out and cannot be selected


Confirmation Page

Display a Confirmation Page once a user has completed their step.

- Task Central uses a single link to access multiple review tasks. As a result, any tags used in Task List Names (set when creating the Task) will not render. It is recommended to use a generic name such as “2023 Manager Review”

Additional Options

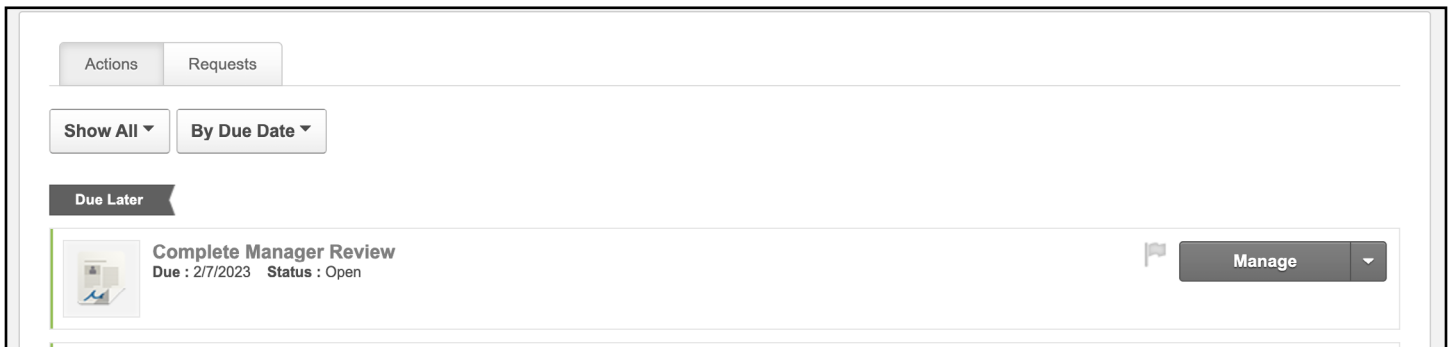
Task List Name for Self: 

Task List Name for Manager: 

Standard Task Experience

Before Task Central, a manager might have multiple links per review task.

Now, with Task Central activated, they can **access all the employee review steps they need to complete for a review task using a single link**. Significantly reducing the time it takes for a reviewer to complete the steps assigned to them in a review.



Due Dates & Statuses

Because of the consolidation of multiple reviews into a single location, the methods for handling Due Dates and Statuses on the Universal Profile Actions, Scheduled Tasks, Action Items and Performance Review Summary pages has changed.

Statuses

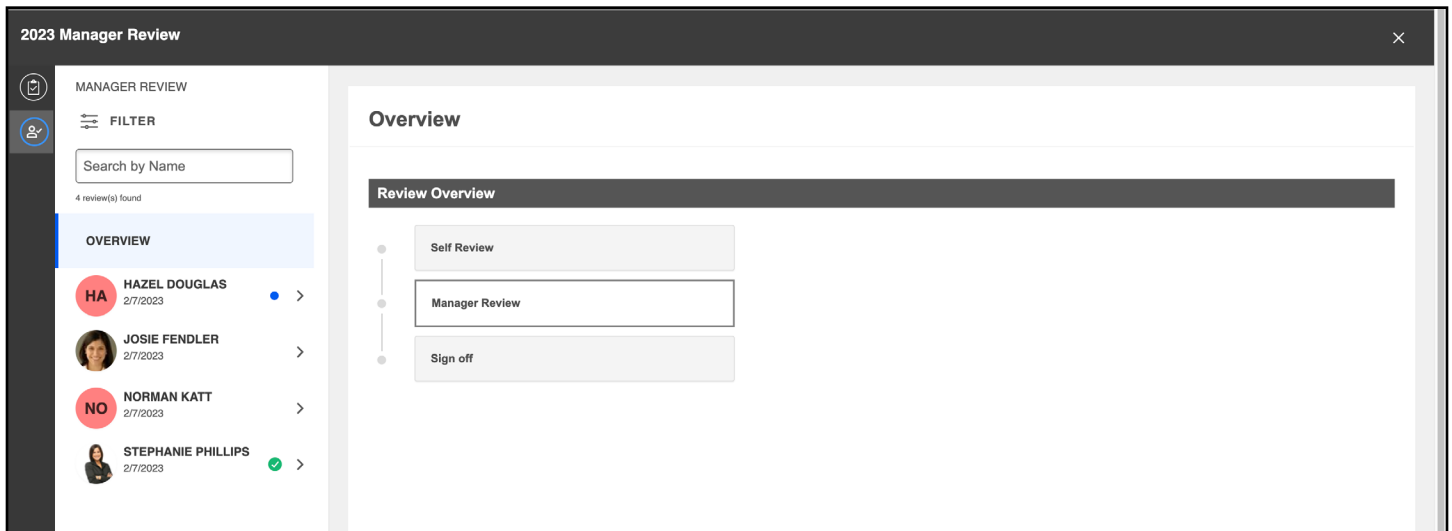
All performance tasks using Review Task Central will show a status of **open** or **closed**.

- **Open** means there are actionable steps to complete.
- **Closed** indicates that there are no current action that can be taken.

Due Dates

Due dates fields will display **the earliest due date in the step if the status is open** and will show **no due date if the status is closed**.

Reviewer view



Once launched, Task Central allows reviewers to navigate between any review step that has been assigned to them for this task and take actions on the sections they need to complete for each user.

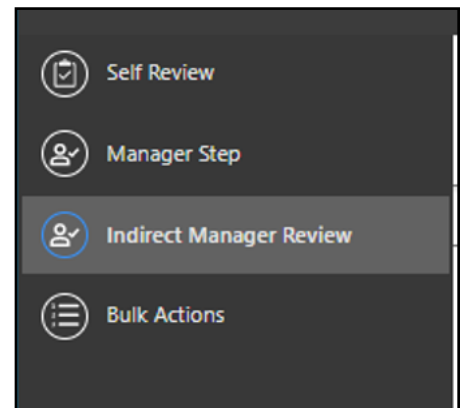
Review Actions Menu

The icons on the far left of the page expand to display the various steps assigned to a reviewer with this task.

The step titles display as they appear in the Performance Review Workflow when the review is created.

The steps are selectable, allowing users to navigate between. The highlighted step is the step that the reviewer is currently working on.

If enabled when creating a review step in the Review Step Workflow, an additional menu item called **bulk actions** will allow a reviewer to bulk submit or reopen review steps.

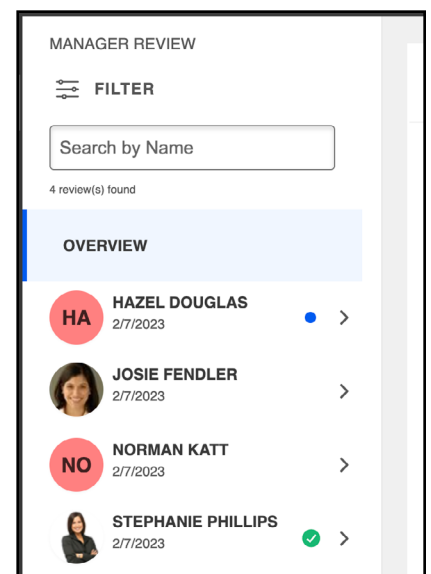


Reviewer Menu

A reviewer will see all the reviews that have been assigned for that step in the left-hand navigation bar

Reviewers will be able to search for a reviewee by name or filter the reviewee list by step status

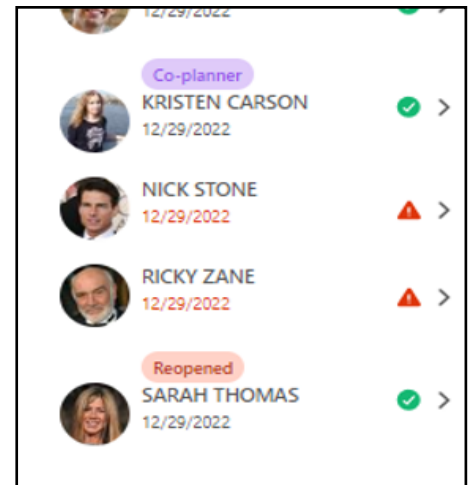
The status and due date of each review is displayed next to the user name.



Status is displayed using three icons:

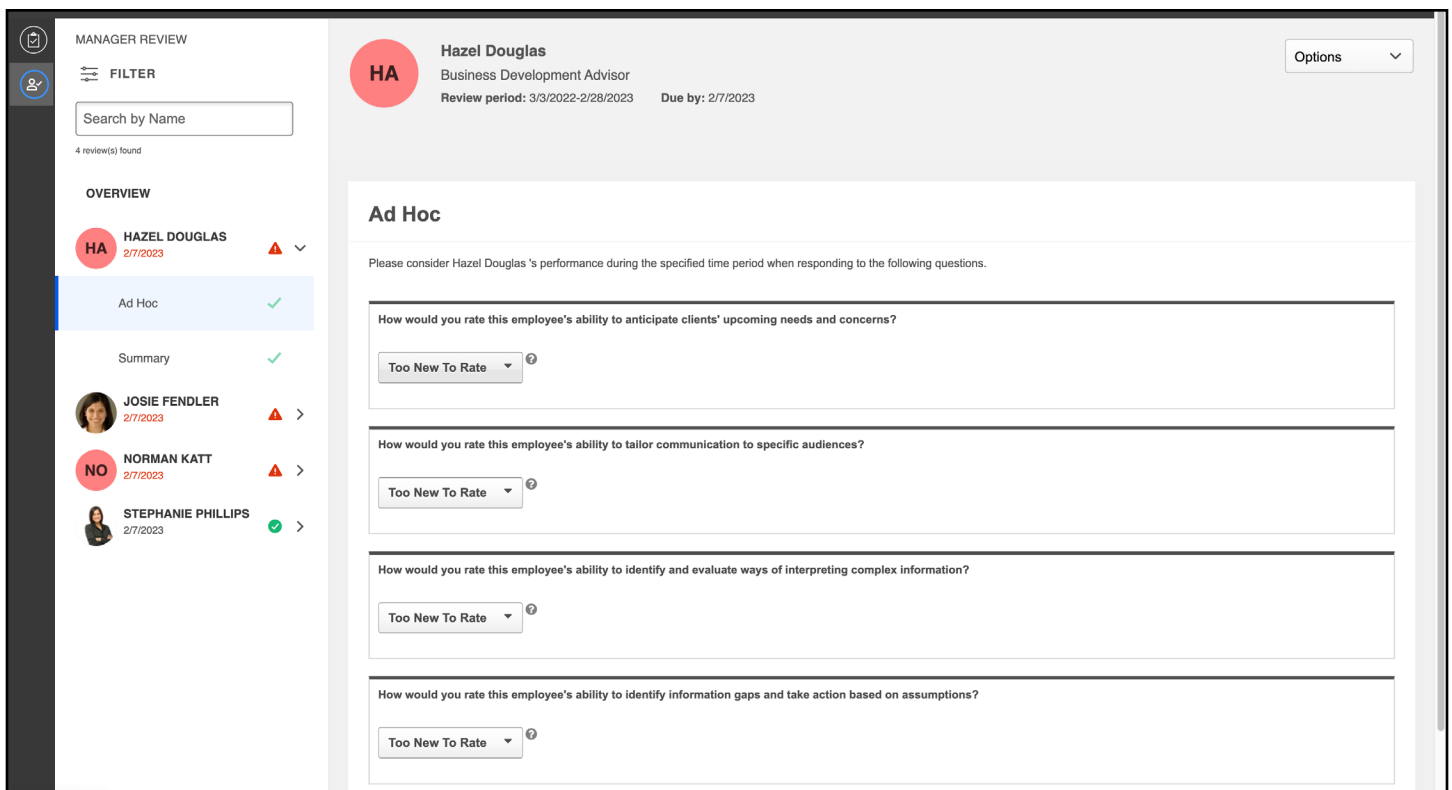
- A **green check mark** means the review is complete
- a **red warning sign** means the review is past due
- A **blue dot** indicates that the review is in progress.

The menu displays tags above the reviewee names to identify when a step has been reopened or if the reviewer is serving as a co-planner for that reviewee.



Accessing Review Step Sections

Selecting the name of a reviewee will expand their available sections. The selected section appears in the middle panel of the page for you to complete.



Completed sections will display a green check icon next its title.

Bulk Actions

When creating a task, during the creation of a review step in the **Review Step Workflow**, you will have the option to **Enable Bulk Submit for this Review Step**.

Edit Review Step

General | **Review Workflow** | Review Summary | Visibility | Confirm

Define Review Step

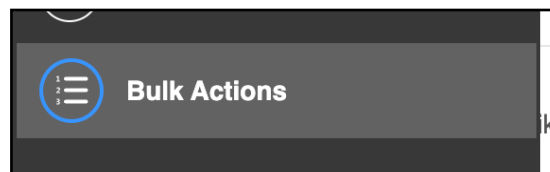
Step Title:

Assigned To:

This step is optional. It will not affect the status of the overall review.

Enable Bulk Submit for this Review Step

When this option is selected in a task, Review Task Central will include an additional Bulk Actions option in the Review Menu.



Bulk Actions

REOPEN | **SUBMIT** | SIGN OFF

Select Review Steps you would like to submit in bulk. Please note that only 1 step type can be submitted at a time.

Manager Review

2 of 2 Selected

<input checked="" type="checkbox"/>	Name	User ID	Position	Manager	Step Status	Step Name
<input checked="" type="checkbox"/>	Josie Fendler	nkenkel3	Accountant	Roy Flanagan	In Progress	Manager Review
<input checked="" type="checkbox"/>	Norman Katt	nkenkel4	Administrator	Roy Flanagan	In Progress	Manager Review

Showing 1-2 of 2

The Bulk Actions page is broken into 3 tabs:

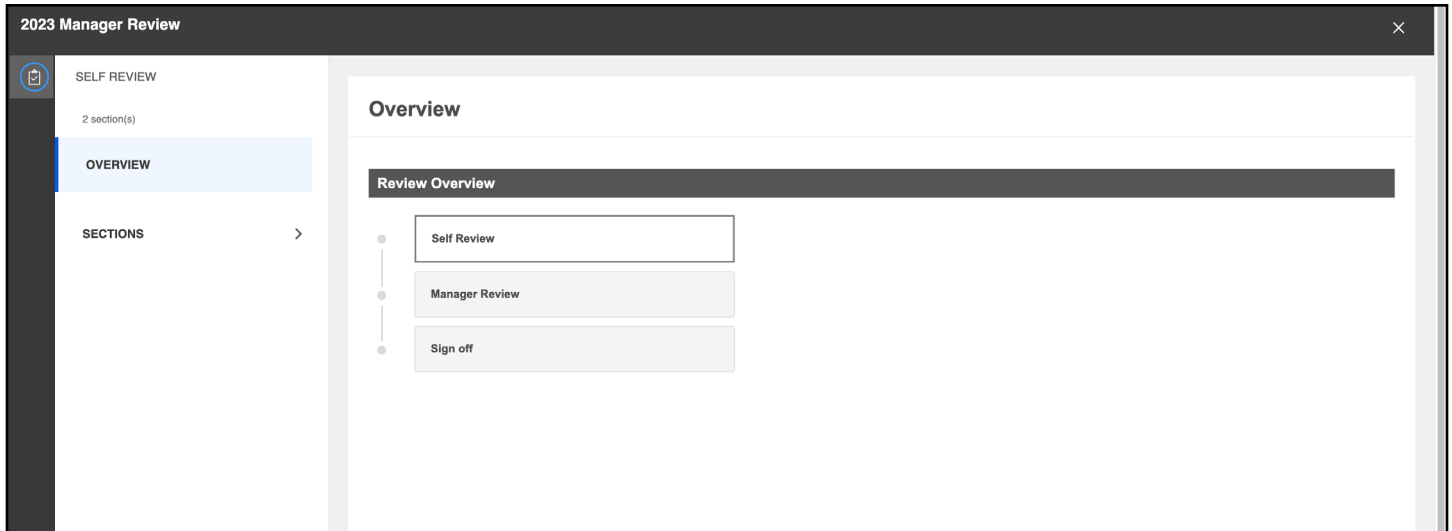
- **Reopen** - allows you to reopen a review step for multiple selected reviewees. Select the **REOPEN STEP** button and provide a reason. The reopened step assignee can view the updated due date for the reopened step.
- **Submit** - allows you to submit multiple assigned review steps at one time. Choose a review step from the **dropdown**, and select the checkbox next to a reviewee name. Any selected reviews can be submitted by selecting the **Submit Reviews** button.
- **Sign off** - allows you to sign off on multiple reviews with sign off steps enabled. Choose a review step from the **dropdown**, and select the checkbox next to a reviewee name. Select the **Sign Off Reviews** button. Enter your signature and submit.

Bulk Sign-Off

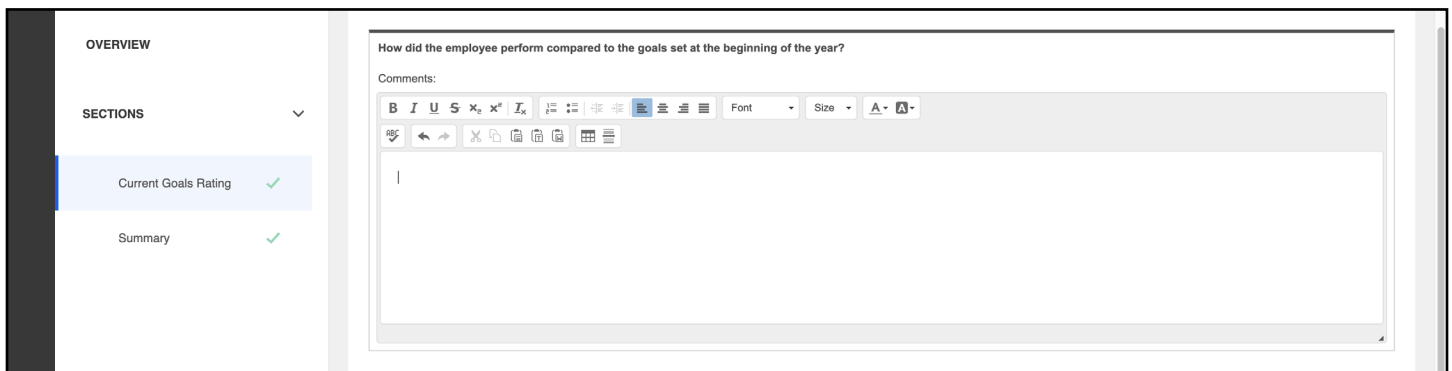
When creating a task, during the creation of a review step in the **Review Step Workflow**, you will have the option to **Enable Bulk Submit for this Review Step**.

When this option is selected in a task, Review Task Central will include an additional Bulk Actions option in the Review Menu.

Reviewee view



The reviewee view of Review Task Central will allow users to navigate between any review step they have been assigned for a task via the review actions menu bar.



As a reviewee completes the sections, those sections will indicate they are completed with a green check mark. Additionally the header in the reviewee view will contain the due date for the step making it clear when they need to complete the review by.

Off-Cycle Task Experience

Reviewee View

For an Off-cycle task the view for a reviewee or a self reviewer will be a little bit different than a standard task.

The reviewee view will show **each occurrence of the off-cycle task** in the menu.

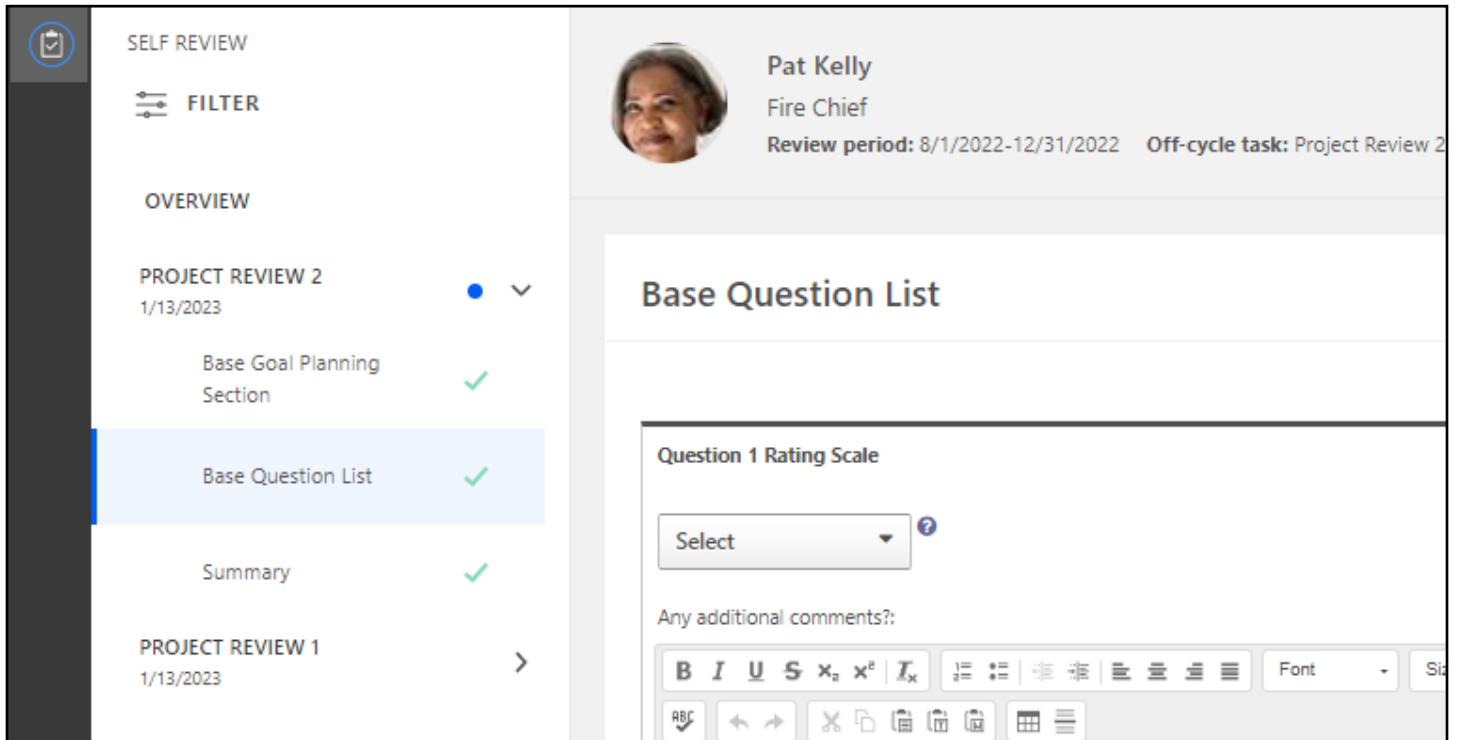
The screenshot shows a user interface for a reviewee. On the left is a navigation sidebar with a 'SELF REVIEW' header, a 'FILTER' button, and an 'OVERVIEW' section. Under 'OVERVIEW', there are two task entries: 'PROJECT REVIEW 2' (dated 1/13/2023) and 'PROJECT REVIEW 1' (dated 1/13/2023). The 'PROJECT REVIEW 2' entry is expanded to show three sub-items: 'Base Goal Planning Section', 'Base Question List', and 'Summary', each with a green checkmark. The 'Base Question List' item is highlighted. The main content area on the right shows the profile of 'Pat Kelly', Fire Chief, with a review period of 8/1/2022-12/31/2022 and an off-cycle task named 'Project Review 2'. Below the profile is a 'Base Question List' section with a 'Question 1 Rating Scale' dropdown menu set to 'Select'. There is also a text area for 'Any additional comments?' and a rich text editor toolbar.

In an off-cycle task reviewee's will also be able to filter by step status and off-cycle task name. this filter is not available to reviewee's in standard tasks.

The screenshot shows a 'Review Step Status' dialog box. It has a close button (X) in the top right corner. Under the 'Status' section, there are four checkboxes, all of which are checked: 'All', 'In Progress', 'Past Due', 'Not Started', and 'Completed'. Below this is an 'Off-cycle task' section with a search input field containing the placeholder text 'Type here to search'. At the bottom of the dialog are two buttons: 'Clear all' and 'Apply'.

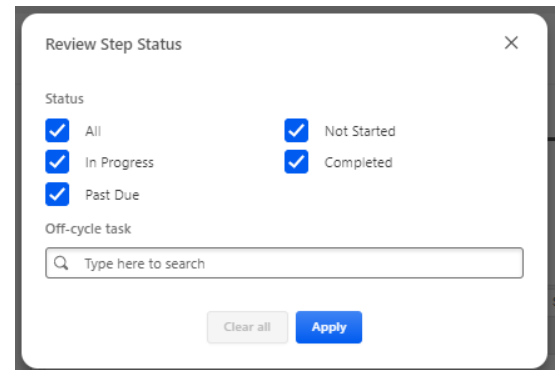
Reviewer View

For a reviewer in an off-cycle task, they will see each reviewee assigned to them, along with the off-cycle task title below the reviewees name.



The screenshot shows a user interface for a reviewer. On the left is a sidebar with a dark background and white text. It includes a clipboard icon, 'SELF REVIEW', a 'FILTER' button with a funnel icon, 'OVERVIEW', and two project review entries: 'PROJECT REVIEW 2' (dated 1/13/2023) and 'PROJECT REVIEW 1' (dated 1/13/2023). Under 'PROJECT REVIEW 2', there are three items: 'Base Goal Planning Section', 'Base Question List', and 'Summary', each with a green checkmark. The 'Base Question List' item is highlighted in light blue. The main content area on the right shows the reviewer's profile: 'Pat Kelly', 'Fire Chief', and 'Review period: 8/1/2022-12/31/2022'. Below this is the title 'Base Question List' and a section for 'Question 1 Rating Scale' with a 'Select' dropdown menu. A text area for 'Any additional comments?' is below that, followed by a rich text editor toolbar with various icons for text formatting and editing.

Reviewers will also see the additional off-cycle filter in the review task central filter.



The screenshot shows a 'Review Step Status' dialog box with a close button (X) in the top right corner. It has two sections: 'Status' and 'Off-cycle task'. The 'Status' section has six checkboxes, all of which are checked: 'All', 'In Progress', 'Past Due', 'Not Started', and 'Completed'. The 'Off-cycle task' section has a search input field with a magnifying glass icon and the placeholder text 'Type here to search'. At the bottom, there are two buttons: 'Clear all' and 'Apply'.

Appendix

Appendix A: Email Tags

In Email Administration, when configuring the **Step Assigned** and **Step Due emails**, the **REVIEW.LINK** tag will generate a Single Sign-On (SSO) deep link when sent.

This requires that both Review Task Central and SSO are enabled in the portal.

Appendix B: What's new in November '23

Display Rating as Text in Task Central

In Task Central, the Bulk actions table has an "Overall Step Rating" column. This displayed ratings for reviewees only in numeric format even when the review task was configured to display ratings in text. Now with the November 13 Release, customers can see this rating in text format as well. It will display ratings as configured in the review task settings: Numeric, Text, or Both.

Bulk Sign Off

Within Task Central, Bulk sign off will be available as one of the bulk actions that any reviewer can utilize. This allows reviewers to view all assigned steps to them in a performance review task, filter it by step type and sign off for multiple users at a time.

PDF Redesign

A redesigned PDF uses newer technology which is compatible with the newer UIs to create a user-friendly interface, along with improved performance and reliability across devices when generating review PDFs.