SRD - Reviewer and Employee Frequently Asked Questions

This page provides further information for Employees and their Reviewers about how to use the SRD application. The guide is divided into questions. Use **Ctrl+Click** to navigate to the advice you need:

When should a review be recorded and who is responsible for this?

When a review is due, an email is sent to both the Employee and the reviewer. The Departmental Administrator will have paired reviewers and reviewees when your Department went live.

Either party can record the review details. Both parties must sign-off the review record before the system will recognise that the review is completed:

Employee sign off

Employee name:

Mr Stuart Band

Awaiting employee sign off

Reviewer sign off

Reviewer:

Mr Simon Redhead

Next review date*

--Please select --

DD-MMM-YYYY

Even if there is no review shown on the system as being due either party can still initiate recording and enter a review record.

Please note: that the review record is only a confirmation of the outcome of the face-to-face meeting (and any subsequent discussions). The system does not replace the review process or facilitate discussions on the content. It is a record of the agreed outcome of the review.

What information is needed for the review record?

The system guides you through the recording process using a breadcrumb trail:

Record Review | Record outcome | Review documentation | Training requirements | Sign off
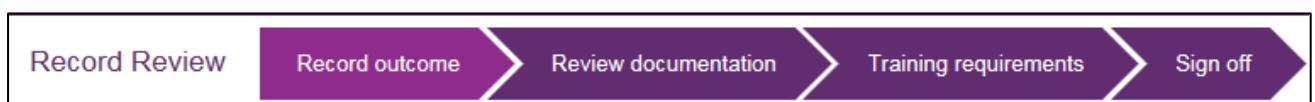
For each review record you can input details of:

The outcome (the meeting date and time, attendees and the type of the review), the documentation used in the review, and the agreed training requirements (with target dates) can all be entered on to the system. Training requirements then appear on a monthly report for use by the Head of Department for planning purposes.

Please note: that entering training information does not constitute a booking and will not be seen by any of the University's training providers. You should continue to book actual places on courses as at present.

What types of document can be uploaded to a review record?

The SRD system supports the following preferred file types:

- Microsoft Word (.doc, .docx)
- Powerpoint (.ppt, .pptx)
- Plain text (.txt)
- Rich text format (.rtf) – most word processors can produce files in this format

If none of these are available a *.pdf file can also be used. Other types of files will not be accepted.

Where possible, upload an original electronic document rather than a scan of a paper document. If scanning is the only option, then scanner software will often allow scanning directly to a PDF file. If this isn't possible then the image produced by the scanner can be cut and pasted into a word processor document. Please ensure that any uploaded documents are legible.

Please note: that the following restrictions also apply:

- The files should not be password protected or encrypted;
- Documents should not contain any macros or other executable code; and
- Documents should not be read only.

Any file uploaded will be converted to a file in PDF/A format.

There is no limit on the number of files that can be uploaded. Each individual file can be up to 10MB in size.

How do I sign off the review process if I do not have access to a computer?

The Departmental Administrator can sign-off a review record on your behalf:

- You do not have access to a computer; and
- Your administrator has seen a paper copy of the signed-off review forms.

Please note: that all notifications for pending reviews are via email so you may need to make a manual note of when the next one is due.

Can I still add more documents once a review has been signed off?

When one or both of the two signatories has signed off the review record, further documents can still be added. A reviewer or an employee may want to add evidence of achievements at any point.   Any new documents uploaded after sign off will be flagged to indicate that they were added post sign off.

What happens when a review has been signed off?

Whenever either of the two parties sign-off the review record the other participant is notified.

When both parties have signed off the review, it will be marked as complete and the Head of Department will be made aware of it. The next review date will be calculated, (based upon the system settings and the dates entered), and the review record will be updated. No email notifications are sent out at this stage. One month before the next review is due an email will be sent as a reminder to both the reviewer and the employee:

Subject: SRD Review Due

This is to confirm that Sinan Ali's next SRD review with Simon Redhead is due to take place on 22nd October 2015.

Please log onto the Staff Review and Development system to initiate the review and arrange an appropriate time to meet.

Further information on this process, and any local schemes held within your Institution can also be found via the Staff Review and Development system.

If you have any queries, please get in touch with your Institute Administrator.

*** This email was sent automatically by the University of Cambridge's Staff Review and Development System, please do not reply to this email as it is sent from an unattended mailbox and replies are automatically deleted. ***

Who can see a review record?

Access to the detailed review record is restricted to the employee, the reviewer and the Departmental Administrator/ Head of Department (or their delegates).

The Central HR and HR School Teams will also receive regular statistical reports of total figures for each area.

What happens when an employee or reviewer leaves?

When an employee is made a leaver in CHRIS their reviews are removed automatically from their reviewer's list. It is therefore important that any in progress reviews for leavers are signed off by the leaver (or the Departmental Administrator on their behalf) before they leave so that the review is no longer listed as outstanding on the monthly departmental burst reporting.

When a reviewer leaves the Departmental Administrator can transfer all the employees they review to their new reviewer at once. All staff will be transferred but if only part of the team is moving to the new reviewer the individuals who are not can be edited separately.

What happens when a new employee joins?

The Departmental Administrator will need set up an initial review relationship for the new starter. They will then appear on their reviewers list. Once they have Raven credentials they can login and will see their review details on the 'My Reviews' tab.

Please note: that there is no automated creation from data in CHRIS/ Web Recruitment for new starter reviews in this release.

What browsers can I use?

The following browsers are supported by the SRD application:

	Windows			MAC		
Application	**Internet Explorer**	**Firefox**	**Chrome**	**Firefox**	**Chrome**	**Safari**[1]
Staff Review and Development application	V9+	V36+	V41+	V36+	V41+	7+

Note: that Front Motion Firefox is not supported although it is part of the standard installed desktop in some areas. If you are using Front Motion please contact your local IT support to arrange for an upgrade to a fully maintained version of the Firefox browser.

If you have any issues with the format or display of the application on these browsers then please contact the HR Systems Service Desk.

When does the SRD application delete review records?

The SRD data will be stored and used in accordance with University's policy on the use and storage of HR Data.

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[1] Note that testing was performed on 8.0.5