

Banner HR Training Documentation

PEAREVW -- Employee Review Form
PERREVW -- Reviews Pending Report

Forms Definition

Banner HR functionality provides an Employee Review Form (PEAREVW) that can be used as an electronic tickler to track various future dated personnel related activities such as:

- tracking the due dates for 3 month, 6 month, and annual performance evaluations;
- tracking review dates following transfers, promotions, demotions or reclassifications;
- tracking the special anniversaries or dates that require HR attention such as noting the 3-year anniversary date for breaks in service to fix the “Adjusted Service Date” to credit the years of prior service.

The PEAREVW form uses org security based on the PEAEMPL home org, and is intended to be used at the Central Office level (Campus or System HR or Benefits).

PERREVW is the Reviews Pending Report that allows Central Office users (Campus or System HR or Benefits) to run a report against the PEAREVW form to obtain a list of all outstanding actions. The report sorts by review date, and there is no security imposed on Banner delivered reports.

Process

Each activity that is to be tracked is assigned a Review Type. Review Types are defined on the Review Type Validation Form (PTVREVT). Examples of review types include:

Review Type Code	Review Type Description
03	3 Month Evaluation
06	6 Month Evaluation
18	18 Month Review Workers Comp
90	Send 90 Day Notice Letters
AE	Annual Evaluation
AX	Appointment Expiration
FE	Funding Expiration
FP	Faculty Pre-Tenure Review
FT	Faculty Post Tenure Review

GR	General Review
RL	Review Leave of Absence
US	Update Adjusted Service Date
VD	Review/ Adjust Pay Vol Demotion

The PTVREVT form allows inquiry access only to Central Level users. It is maintained by STHRs and Central Level offices can request, via email, the establishment of new Review Type Codes as needed. The request should contain the recommended Review Type Code and the appropriate Review Type Description.

Once the Review Types are established, the Central Level user accesses the PEAREVW form to type in an employee's ID in order to link the employee with the Review Type Code and the review date of when the specific action is to occur. At this point, it is also possible to identify the 'reviewer' and type in the ID of the individual responsible for completing the action required. PEAREVW allows the Central Level user to enter free form comments (selection under options). The free form text comment area should not be used to describe an employee's performance, but rather to document process issues, such as "Evaluation delayed due to supervisor resignation" or to simply note the date materials are received in the Central Level office.

The PEAREVW form allows the user to assign a 'reviewer' or person responsible for the action indicated by the Review Type, along with a target review date. Once the Review Type action has been taken, the Central Level user should update the PEAREVW form as follows:

- Click on the 'completed' box to show the task is finished (a blank box indicates the activity is still pending);
- Use the scroll bar to access the box to enter the date the task was completed;
- If not identified earlier, the use can use the scroll bar to access the box to enter the USNH ID of either the Central Level user updating the form or the individual who completed the task. This action will cause that individual's name to appear in the 'Reviewer Name' column on the form. NOTE that the USNH ID cannot be retrieved on PEAREVW.

A report can be run (PERREVW) which will show all pending activity in chronological order based on a parameter that requires an 'as of' tickler date. There is no security imposed on Banner delivered reports, and the report does not have any parameters to select appropriate orgs; consequently, the report will list ALL USNH pending activities entered through PEAREVW. The steps in initiating a Banner job submission are as follows:

- At the *Direct Access* box in Banner HR type in PERREVW;

- Initiate two 'next block' commands;
- The second 'next block' will display the current date (activity date). It is possible to override this date (day/month/year). No other parameters are required;
- Initiate one 'next block' commands. It is not necessary to 'save parameters';
- Click on 'save';
- Make note of the number at the bottom of the screen;
- Under 'Options' select 'Review Output'
- The number of the job submission should appear in the 'Number' block at the top of the screen. If it does not, type it in;
- Double click in the 'File Name' block;
- A box will appear that displays the output for the .lis and .log files for the numbered job;
- Be sure the .lis file is highlighted and once it is, double click;
- Under 'Options' select 'Show Document (Save and Print File)';
- A box will appear asking if you want to continue. Click on yes;
- The report will appear. This report will display the review date, review type, ID, Name, Org, Reviewer's ID and Name for all incomplete actions that are being tracked.

Suggested Uses

This form can be used for both campus specific and centralized tracking. A few examples of centralized tracking are as follows:

1. Use PEAREVW form to track 6 month evaluations. It is anticipated that this form could be used Systemwide for this purpose. The business practice should be that a record will be added in PEAREVW at the time of hire for any employee who has an introductory period in order to flag that the evaluation materials should be sent out at the 4.5 month mark. Further, when the evaluation materials are completed and returned to the Campus HR Offices, the PEAREVW record can be amended to note that action is "complete" (checkbox).
2. Use PEAREVW form to track 90 day notices. All employees in term or grant funded positions should receive 90-day notice letters confirming that the appointment will terminate on a given date and that further appointment is contingent upon funding.
3. Use PEAREVW form to monitor employees with breaks in service who need to earn back their service time for the purposes of accrual and longevity.

Security

Any Central Level user in the following security classes are able to access these forms:

PEAREVW

Security Class	BEN_SYS_CAM_HR	Campus/System HR & Benefit Admin
	EM_REVIEW_TRACK	Campus HR
	EM_REV_TRACK_INQ	BSCs/Departments

PERREVV

Security Class	BEN_SYS_CAM_HR	Campus/System HR & Benefit Admin
	EM_REVIEW_TRACK	Campus HR