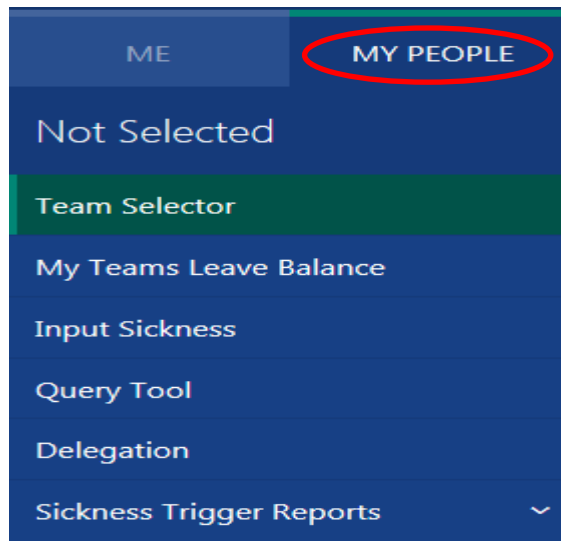


How to Record Team Checks

This module allows you to record the date that you held an Employee Review and Development (ERD) meeting with each employee in your team.

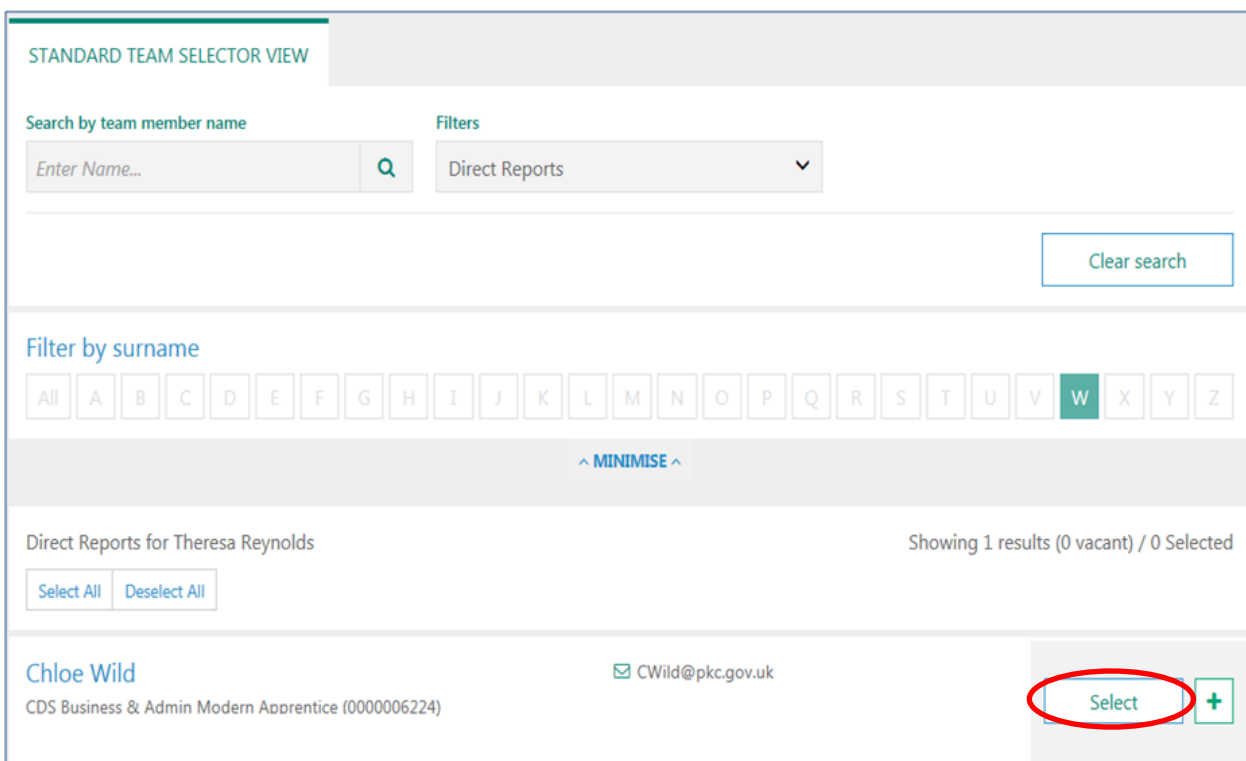
Access to Module

- Log into MyView Dashboard, then click on **My People**.

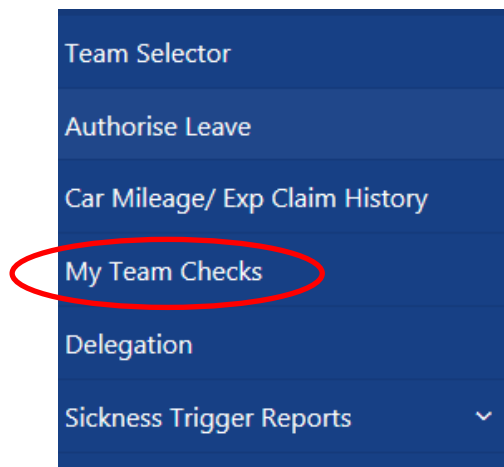


Team Selector will highlight to show a list of your direct reports.

- Click **Select** for the employee you wish to enter the ERD date.



- Click on **My Team Checks**



- Click on **Create**
- If the employee has more than one post, click into **Post** box and select the relevant post.

A screenshot of a web form titled 'Appraisal Details' with the subtitle 'Please enter the appraisal details'. On the left, there are two labels: 'Post' (circled in red) and 'Type'. To the right of 'Post' is a dropdown menu showing 'CDS Business & Admin Modern Apprentice'. To the right of 'Type' is a dropdown menu showing '--Select--'.

- Then click in **Type** and select from the list shown.




A screenshot of the 'Appraisal Details' form. The 'Post' dropdown is now set to 'CDS HR Assistant'. The 'Type' label (circled in red) is next to a dropdown menu that is open, showing the following options: '--Select--', ANNUAL, INITIAL, and INTERIM.

- **Annual** – For once a year meetings
- **Initial** – For new employees to PKC or employees who have changed post, within eight weeks of commencement of employment.
- **Interim** – For meetings held more than once a year, e.g. six monthly.

- Click **Next** once the relevant type has been entered.
- Enter the date completed by clicking on the calendar icon or entering the date manually.

Appraisal Details




Please enter the appraisal details

Post	<input type="text" value="CDS HR Assistant"/>
Type	<input type="text" value="ANNUAL"/>
Completion Date	<input type="text" value="07/05/2018"/> 
Status	--Select-- 
Result	--Select-- 

- Click on the **Status** box and select **Completed** – *please do not select any of the other options.*

Appraisal Details




Please enter the appraisal details

Post	<input type="text" value="CDS HR Assistant"/>
Type	<input type="text" value="ANNUAL"/>
Completion Date	<input type="text" value="07/05/2018"/> 
Status	Completed 
Result	--Select-- 

- Ignore the Result box and click on **Submit**.

Appraisal Details

Please enter the appraisal details

Post	<input type="text" value="CDS HR Assistant"/>
Type	<input type="text" value="ANNUAL"/>
Completion Date	<input type="text" value="07/05/2018"/> 
Status	Completed 
Result	--Select-- 

Information will be sent to the core system, where it can be reported on for Service Management Teams.