

# PM Dashboard

The Performance Management Dashboard shows you information regarding the status of reviews that you are responsible for.

## Six States

There are six states that a Performance Review can be in at any time.



## Not Scheduled

The first stage of the review process. The review for this staff member hasn't been scheduled yet. Click to open this option and click **Schedule** alongside the relevant reviewee to set the review date.

## Scheduled

The meeting has been scheduled but no content has been added to the review. Click to open this option and then click on the **Edit** icon to enter the review creation area. As soon as you have edited the document it will move to the **Draft** status.

## Draft

The review has been started but not yet sent to the reviewee for confirmation of accuracy. Click to open this option and then select **Submit for feedback**. This will take you back into the review where you can check it over before clicking **Submit for feedback** again.

## Feedback Pending

The stage of the process which the reviewee is required to act. The review has been submitted to the reviewee and they are required to confirm its accuracy.



You won't be able to access the review at this point until it has been responded to.

Once feedback is given it will appear under the **In Revision** menu.

## In Revision

This is the penultimate stage of the review. You can see whether the reviewee marked the document as accurate or inaccurate and view their comments. If you wish to make any changes at this point, click on the **Edit** button. If you are happy click **Finalise**. This will take you into the Review again where you can click the green **Finalise Review** option.

## Finalised

The final stage of the review meeting. The review has to be Finalised for the Targets to become available to both parties. The Targets are where you add updates throughout the year and record any mid-year review notes.

## Need any more help?



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