User Topic

Action Item - Performance Review Task

All steps of a performance review appear on the user's Action Items page, including reopened steps.

To access the Action Items, go to **Home > Universal Profile**. Then, click the Actions tab. *Note: The location of this link is configurable by your system administrator.*

🔒 Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Action Items - EPM	Grants ability to view and take action upon Performance (EPM) items on the Action Items page and in the Your Action Items widget. This permission can be constrained by OU, User's OU, User's Self, and User's Self and Subordinates. This is an end user permission.	Universal Profile

View Team

The View Team flyout allows managers, approvers, and custom relationships to quickly navigate between subordinates' profiles and transcripts. When enabled, the View Team flyout is available to managers and dotted line managers on all pages of their Universal Profile and the Universal Profile of their subordinates. This flyout displays the manager's reports visually.

The **View Team** button displays if enabled in the portal. Administrators may enable or disable this flyout via the My Team Dropdown section within Universal Profile General Preferences. *See Universal Profile General Preferences.*

See Universal Profile - View Team Flyout.

Options

An **Options** drop-down may be available on various pages of the Universal Profile. This menu may include options such as Assign Training and Create Goal. *See Universal Profile Options Drop-down Overview.*

Performance Review Action Item Details

When a performance review action item is displayed on the Action Items page, the following is displayed for each action item:

- Color Strip - The left edge of the action item icon is color coded to represent proximity to the due date of the action item. For example, if the action item due date is past due, then the color strip is red to indicate that action is required immediately. If an action item due date is not eminent, then the color strip is green to indicate that action is not required immediately. *See the Color Strip Key section below for additional information.*
- Title - This displays the action item title. If the user is a co-planner for the review task, then the task title indicates this. Click the action item title to open the appropriate step of the performance review.
- Due Date - This displays the action item due date.
- Status - This displays the current status of the action item. *See the Performance Review Task Statuses and Actions section below for additional information.*
- Priority Flag - This button allows users to mark action items as high priority. Priority can be helpful as a visual indicator to users. Also, action items can be filtered by priority from the Sort drop-down at the top of the page.

  When the priority flag is not selected, it is gray 🏳. When the priority flag is selected, the action item is high priority and the flag is red 🚩.

Action Item Options

The following options are available from the action item drop-down menu:

- Launch - Click this option to open the appropriate step of the task.
- Print PDF - Click this option to open the Print Review pop-up.
- Work Offline - Click this option to download the performance review as an Excel file, which can then be completed offline and uploaded to the system.
- View all Reviews - Click this option to open the Performance Reviews Summary page.

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