Employee Performance Reviews
Process Automation

About this automation:

Use this process to send a reminder task and create documents required for regular employee performance reviews.

Simply import the sample automation, customise to suit your practice, test and activate!

What's included:

- ✅ Performance Review Document & Email Templates
- ✅ Automation Process Steps

How to import:

Before you begin - ensure your **Employee View** has been saved.
- Employee Status = Active
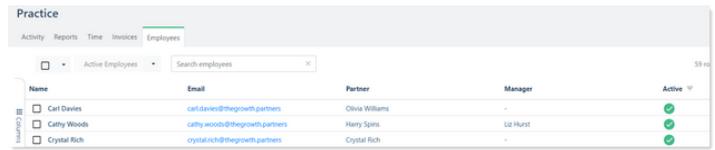
Step 1 - Save the import file locally

The first step is to download the zip file provided in FYI's help centre.

Simply save the file locally, for example, in your Windows Explorer Downloads folder. You **do not** need to extract the files.

Step 2 - Import the files into FYI

Navigate to the **Automations** screen and click the **Import** button on the right-hand side of the screen.

Locate and select your saved "Employee Performance Review" file and click **Open** to import the automation.

You can also drag and drop the zip file to the Automation list view.

The Process and Templates will be imported into FYI.
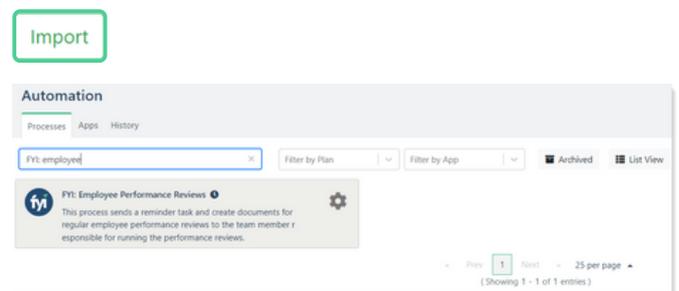
Step 3 - Review the process

Review the Templates
Locate the templates in **Knowledge** - **Templates**. The templates will import with the prefix FYI making them easy to locate.

- Review and personalise the imported templates
- Update the template **Status** to Active.

Edit and Review Each Process Step
The Custom Process is imported with the **Status** set to Draft. You can locate the process by searching in the "Search processes" field.

- Review the schedule and owner
- Review and update each **process step.** Specific comments have been added to the steps where action is required. These will display in **blue**.
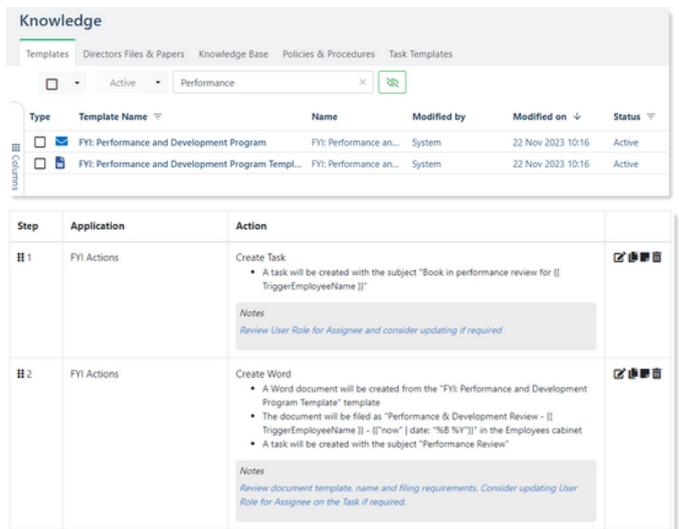
Step 4 - Test and run the automation

Click the **Test** button to display a list of Employees.

From Select Test Employee, search and select a specific employee to run the test for and select **Run Test**. A Test Employee is handy for testing scheduled automations.

Review the test by clicking the **View History link**, or from the Employee workspace.

When ready, set the **Status** to Active. The process will run automatically according to the schedule.