



What's New in emPerform Version 5.5?

Customer Release Notes

Release Date: November 4-2025

We are committed to the ongoing development and improvement of emPerform. This new release brings important upgrades to help support your organization's performance management efforts. The following document outlines the new release features and enhancements.

As always, please feel free to contact us with your questions or feedback.

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In This Document:

- [New Features](#)
- [Enhancements](#)
- [Instructions for Upgrade](#)

New Features

New Features in emPerform 5.5:

What's New?		Area	Details
	Appraisal Dashboard – Performance Score Over Time	Appraisal	Introduces visual dashboards to track performance metrics over time.
	Rich text box added for comment control on review side.	Appraisal	Review-side comment boxes now support rich text formatting for improved readability and professional presentation.
	Ability for users to copy library items (i.e. goals) on the front-end from current review.	Appraisal	Enables users to copy library items directly from the current review interface, reducing administrative overhead.
	Average Compensation Cost by Organization Level	Compensation Dashboard	New feature enables data insights on average compensation through organization level filter.
	Team Compensation Comparison with Score	Compensation Dashboard	Ability to compare team compensation alongside performance scores.
	Compensation Breakdown by Organization Level	Compensation Dashboard	Ability to view detailed compensation breakdown through organization level filter.
	Pay Equity Analysis	Compensation Dashboard	Provides deeper pay-equity insights, helping organizations identify and address compensation gaps.
	Compensation Distribution	Compensation Dashboard	Provides overview of the individual total compensations distributed within the customizable ranges.

Enhancements

Enhancements in emPerform 5.5:

What's New?	Area	Details
Hidden rater group dropdown on 360° nominations if no rater group exists.	Appraisal	Automatically hides the rater group dropdown when no rater group exists, creating a cleaner and more intuitive 360° nomination experience.
Option to select 'Max mandatory count before leaving' on Evaluation area setup.	Appraisal	Adds a "Max Mandatory Count Before Leaving" option so administrators can set minimum completion thresholds before users exit an evaluation area.
Execute Jobs for Inactive appraisals.	Appraisal	Set jobs can now run on inactive appraisals, ensuring that updates and background tasks continue without requiring manual activation.
Show the 'view direct reports data' for the sections you selected to turn it on for in the detail section.	Appraisal	Admins can instantly reveal or hide direct-report data within Manager's review by using the intuitive "eye" toggle in the detail section.
Preview email and be able to add an email from Set Jobs.	Appraisal	Provide the ability to preview the selected email template for a Set Job directly within the Design interface, along with an option to create and add a new email template from the same page, eliminating the need to navigate back to the email templates section
Hidden reviewer label on 360° reports if reviewer is anonymous.	Appraisal	Reviewer labels are automatically hidden in 360° reports when anonymity is enabled, strengthening confidentiality.
Hidden "Rating Column" option in the 360° appraisals on review grid.	Appraisal	Administrators can hide or display the rating column in 360° appraisals to match organizational preferences.
Hidden submitted response on 360 nomination page.	Appraisal	Adds the ability to hide submitted responses on the 360° nomination page when the rater's name is set to 'Anonymous' or 'None', rather than 'Named'. The supervisor will not be able to see whether a response has been submitted—ensuring greater anonymity for participants
Added download attachment option under 'Utilities' menu option	On-Demand Forms	Adds a convenient download option under the Utilities menu for attachments within On-Demand Forms.

	Tag wall enhancement –Tag Category added, send tag content in email	Tag Wall-Admin	Introduces tag categories and the ability to send tag content via email for improved knowledge sharing
	Color and font changes on Group consolidation report	Compensation	Updated colors and fonts for sharper, more accessible reporting visuals.
	New Admin Report to display appraisal wise data modification (status report).	Report Manager	This feature within report manager gives admins visibility into all changes made within appraisals. This report acts as an audit trail, helping admins track appraisal data when updated.
	Addition of font changes in Print report and employee evaluation report (SSRS).	Report Manager	Larger, consistent fonts across employee evaluation reports to improve readability.
	Ability to separate Employee code and name columns in following reports: - Employees in WF state - Employees in WF state by reviewer	Report Manager	Adds the ability to separate employee code and name columns in key reports such as <i>Employees in Workflow State</i> and <i>Employees in Workflow State by Reviewer</i> for cleaner exports.
	Ability to view transition date on workflow timeline.	Appraisal	New appraisal feature allows the option to view transition dates on the workflow timeline for better data insights.
	Option to copy review data between evaluation areas with different library types.	Appraisal	Ability to copy goals and review data across evaluation areas even when different library types are used, saving significant setup time.

New Features & Enhancements in Detail

Appraisal Dashboard- Performance Score Overtime

A new interactive dashboard lets managers and HR track employee's performance trajectory across review cycles. Users can filter by role, or review type to identify trends and spot coaching opportunities early.

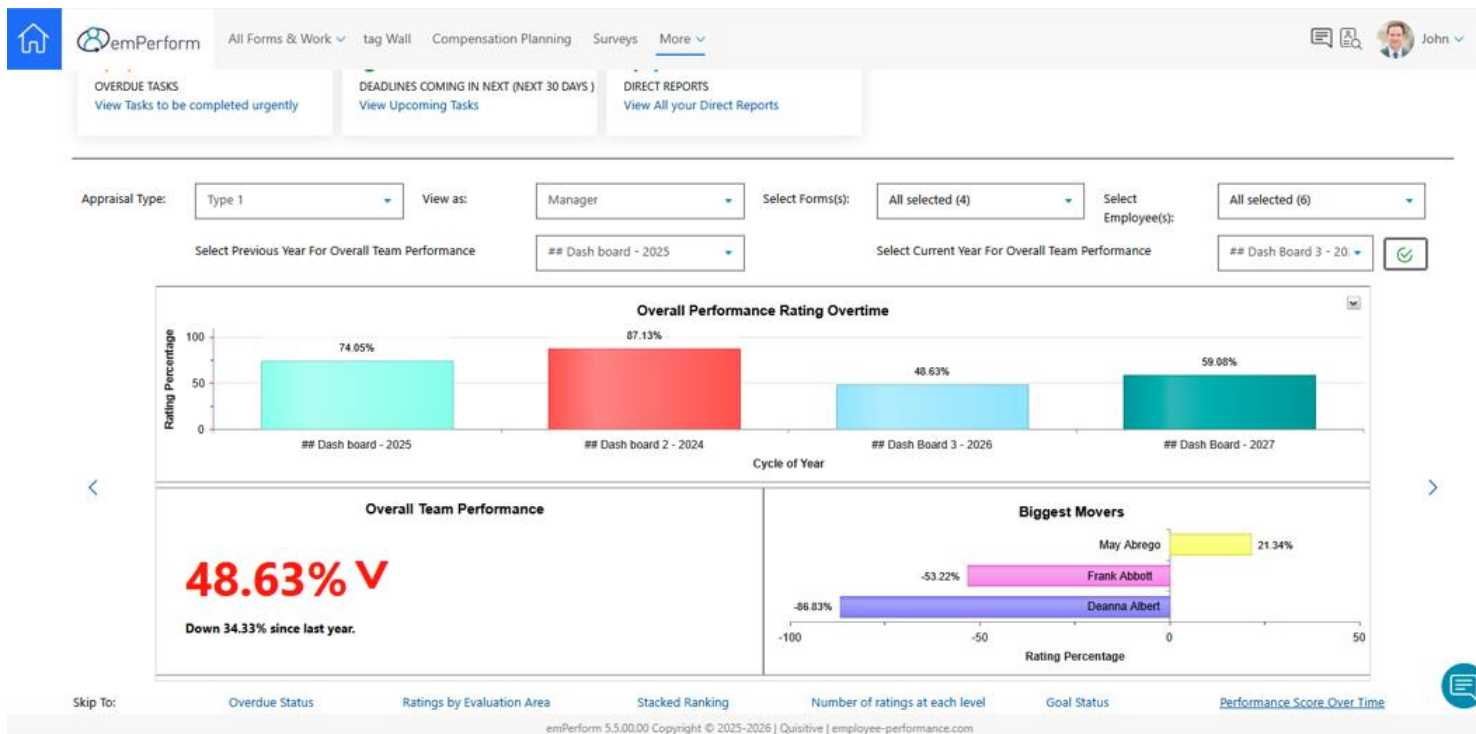
When multiple forms are selected, they are used to generate the first graph: **Overall Performance Rating Over Time**.

For the other two graphs:

Overall Team Performance – compares selected forms labeled as “previous” and “current.”

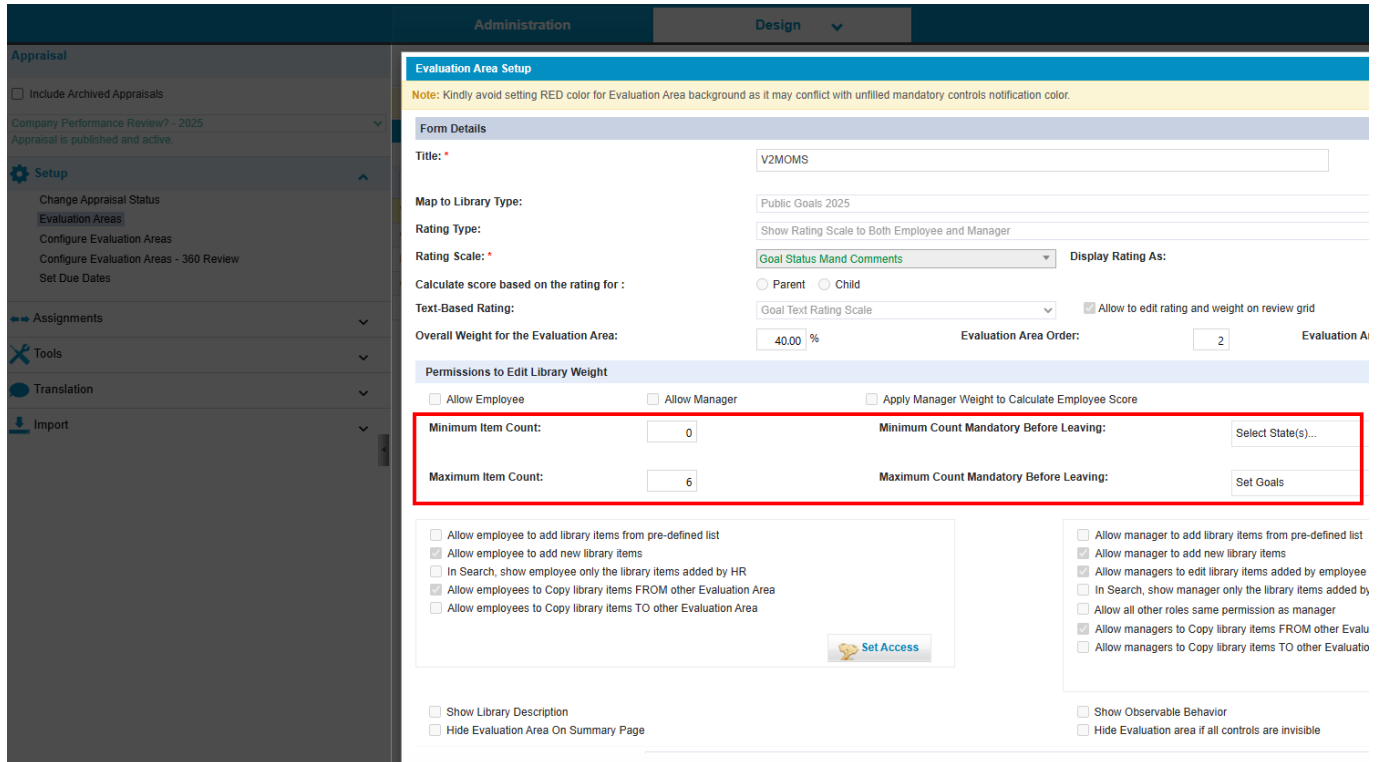
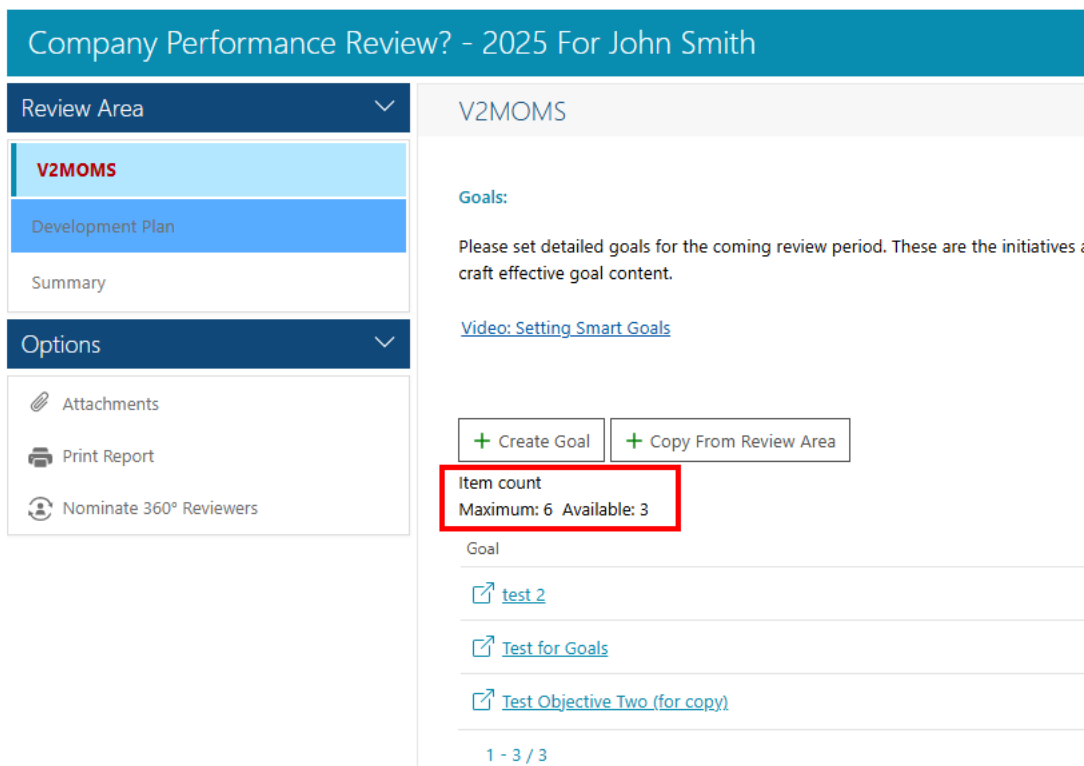
Biggest Movers – highlights the biggest changes between the “previous” and “current” forms.

The option to manually select “previous” and “current” forms is provided because the *Appraisal Year* column may not always contain actual year values—it could include text or custom labels. This flexibility ensures users can compare any two appraisal cycles they choose, regardless of how the year is represented.



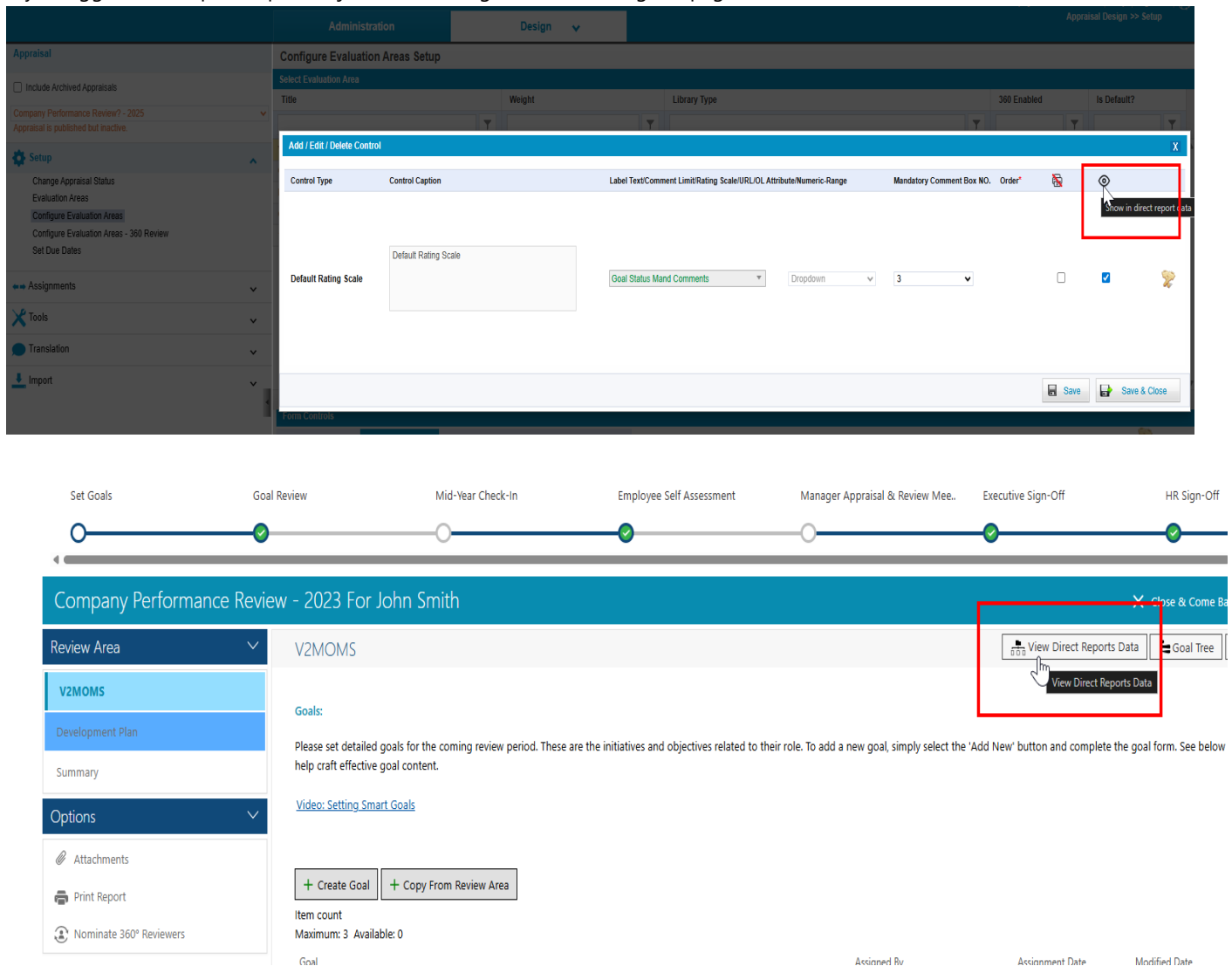
Max Mandatory Count

Administrators can now define the minimum and maximum number of required fields that must be completed before reviewers can exit an evaluation area. This ensures data integrity and prevents incomplete submissions.

Direct Reports Data

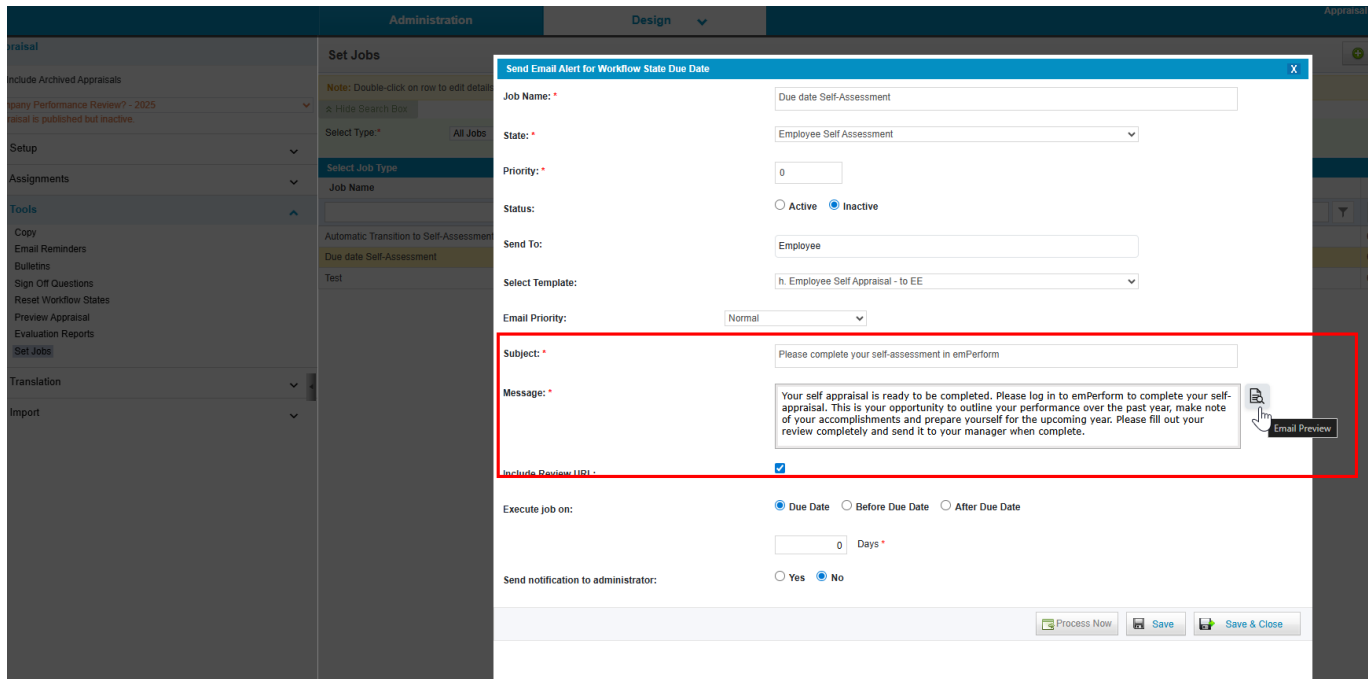
Administrators can instantly show or hide the employee's appraisal data from within the Manager's own review using the new "eye" toggle. This helps compare objectives or ratings without leaving the page.



The screenshot displays the emPerform interface. At the top, a progress bar shows the review process stages: Set Goals, Goal Review, Mid-Year Check-In, Employee Self Assessment, Manager Appraisal & Review Mee., Executive Sign-Off, and HR Sign-Off. Below this, the 'Company Performance Review - 2023 For John Smith' page is shown. The left sidebar contains 'Review Area' (V2MOMS), 'Development Plan', 'Summary', and 'Options' (Attachments, Print Report, Nominate 360° Reviewers). The main content area shows 'Goals' for V2MOMS, with instructions to set detailed goals and a video link 'Video: Setting Smart Goals'. There are buttons for '+ Create Goal' and '+ Copy From Review Area'. The 'Item count' is 3, and 'Maximum: 3 Available: 0'. A table with columns 'Goal', 'Assigned By', 'Assignment Date', and 'Modified Date' is partially visible. A red box highlights the 'View Direct Reports Data' button in the top right corner of the review page. Another red box highlights the 'eye' toggle in the 'Add / Edit / Delete Control' dialog, which is used to show or hide appraisal data in direct reports.

Email Preview in Set Jobs

Before activating automated emails, administrators can preview message templates directly within the workflow.



Send Email Alert for Workflow State Due Date

Job Name: Due date Self-Assessment

State: Employee Self Assessment

Priority: 0

Status: ☐ Active ☒ Inactive

Send To: Employee

Select Template: h. Employee Self Appraisal - to EE

Email Priority: Normal

Subject: Please complete your self-assessment in emPerform

Message: Your self appraisal is ready to be completed. Please log in to emPerform to complete your self appraisal. This is your opportunity to outline your performance over the past year, make note of your accomplishments and prepare yourself for the upcoming year. Please fill out your review completely and send it to your manager when complete.

Include Review URL: ☒

Execute job on: ☒ Due Date ☐ Before Due Date ☐ After Due Date

Days: 0

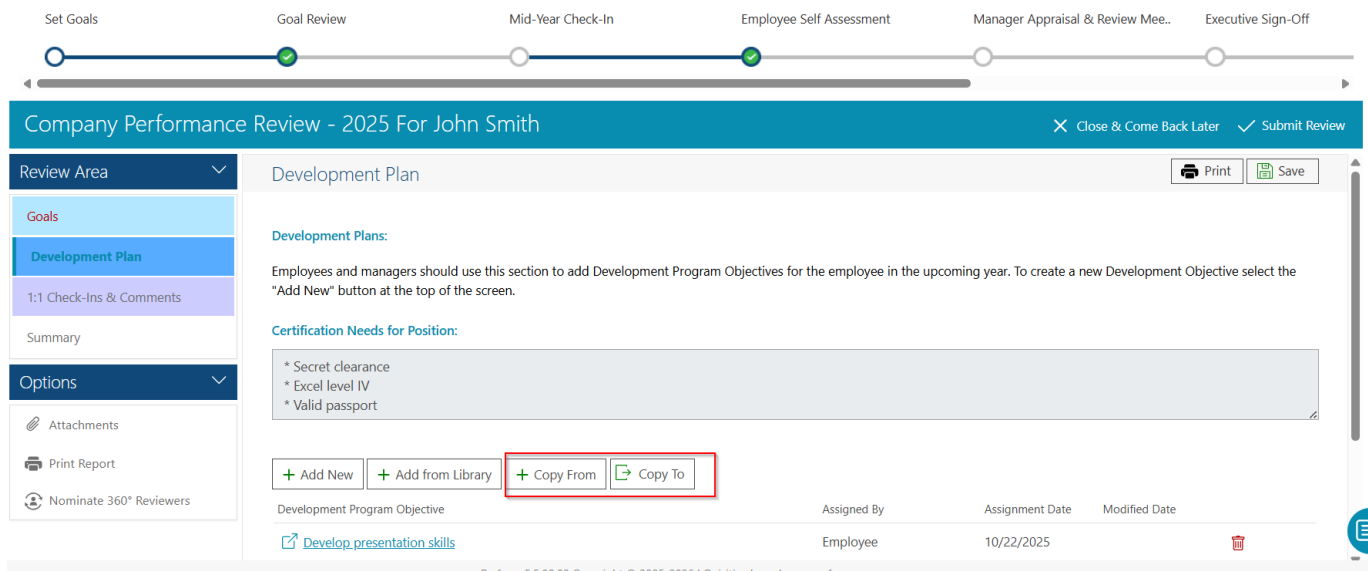
Send notification to administrator: ☐ Yes ☒ No

Buttons: Process Now, Save, Save & Close

Red box highlights Subject and Message fields. Red arrow points to Email Preview button.

Cross-Library Data Copy

Users can now copy review data or goals between evaluation areas.



Company Performance Review - 2025 For John Smith

Close & Come Back Later Submit Review

Review Area: Goals, Development Plan, 1:1 Check-Ins & Comments, Summary

Options: Attachments, Print Report, Nominate 360° Reviewers

Development Plan

Development Plans:

Employees and managers should use this section to add Development Program Objectives for the employee in the upcoming year. To create a new Development Objective select the "Add New" button at the top of the screen.

Certification Needs for Position:

- * Secret clearance
- * Excel level IV
- * Valid passport

Buttons: Add New, Add from Library, Copy From, Copy To

Development Program Objective	Assigned By	Assignment Date	Modified Date
Develop presentation skills	Employee	10/22/2025	

Red box highlights Copy From and Copy To buttons.

Rich-Text Comment Boxes

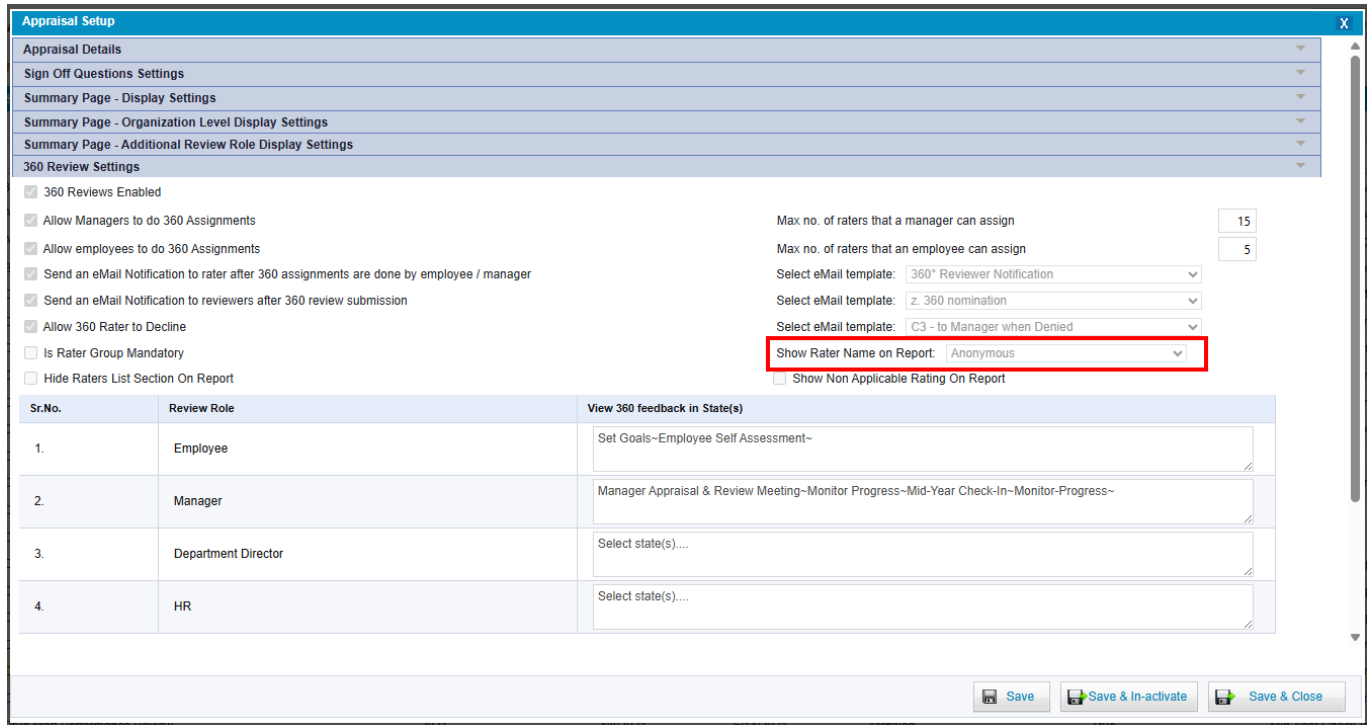
The screenshot shows the 'Configure Evaluation Areas Setup' dialog box. The 'Add / Edit / Delete Control' tab is active. A table lists controls, with the 'Comment box' control selected. The 'Enable Richtextbox' checkbox is checked and highlighted with a red rectangle. The 'Order' column shows the value '1'. At the bottom right are 'Save' and 'Save & Close' buttons.

Control Type	Control Caption	Label Text	Comment Limit	Rating Scale	URL/LOL Attribute	Numeric Range	Tag comment control	Enable Richtextbox	Order*	
Comment box	Manager Comments:		Comment Limit: 0	Default no of Rows: 0			☐	☒	1	☐

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Anonymous Reviewer & Hidden 360° Rating Column Option

1. Reviewer names are hidden automatically when anonymity is enabled.
2. Admins can hide the Rating Column. These options enhance confidentiality and visual clarity.



Appraisal Setup

Appraisal Details

Sign Off Questions Settings

Summary Page - Display Settings

Summary Page - Organization Level Display Settings

Summary Page - Additional Review Role Display Settings

360 Review Settings

☒ 360 Reviews Enabled

☒ Allow Managers to do 360 Assignments

☒ Allow employees to do 360 Assignments

☒ Send an eMail Notification to rater after 360 assignments are done by employee / manager

☒ Send an eMail Notification to reviewers after 360 review submission

☒ Allow 360 Rater to Decline

☐ Is Rater Group Mandatory

☐ Hide Raters List Section On Report

Max no. of raters that a manager can assign: 15

Max no. of raters that an employee can assign: 5

Select eMail template: 360° Reviewer Notification

Select eMail template: z. 360 nomination

Select eMail template: C3 - to Manager when Denied

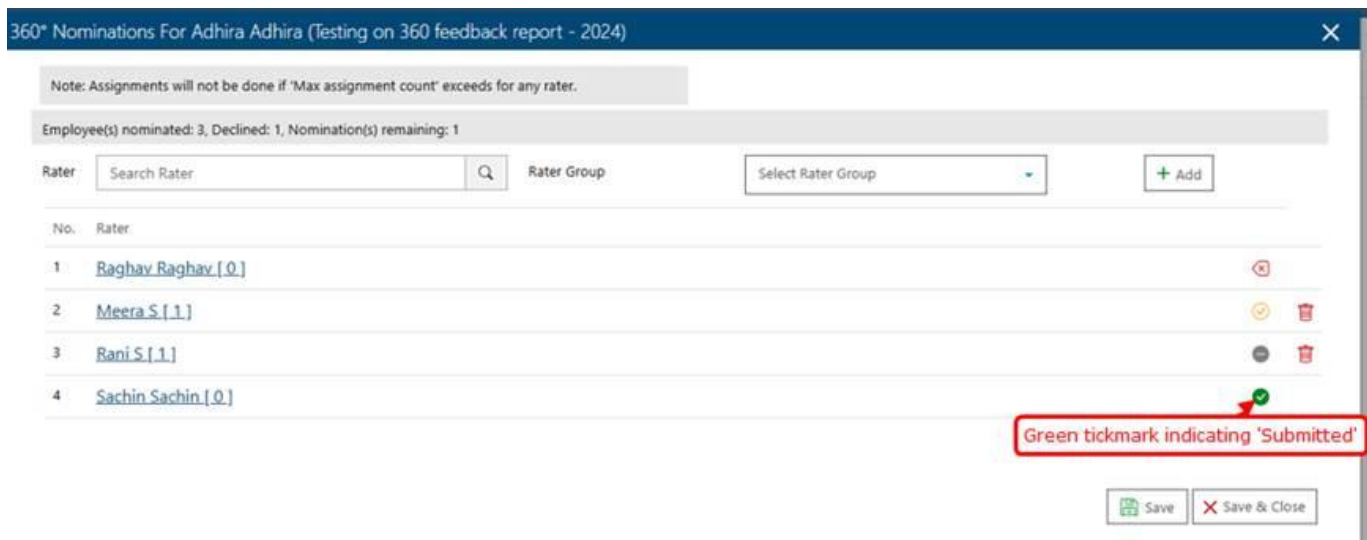
Show Rater Name on Report: Anonymous

☐ Show Non Applicable Rating On Report

Sr.No.	Review Role	View 360 feedback in State(s)
1.	Employee	Set Goals-Employee Self Assessment~
2.	Manager	Manager Appraisal & Review Meeting-Monitor Progress-Mid-Year Check-In-Monitor-Progress~
3.	Department Director	Select state(s)...
4.	HR	Select state(s)...

Save Save & In-activate Save & Close

If 'Named' is selected for this setting, the 360 nomination page will look like this –



360° Nominations For Adhira Adhira (Testing on 360 feedback report - 2024)

Note: Assignments will not be done if 'Max assignment count' exceeds for any rater.

Employee(s) nominated: 3, Declined: 1, Nomination(s) remaining: 1

Rater Search Rater Group Select Rater Group + Add

No.	Rater	Status
1	Raghav Raghav [0]	
2	Meera S [1]	
3	Rani S [1]	
4	Sachin Sachin [0]	Submitted

Save Save & Close

If 'Anonymous' or 'None' is selected for this setting, the 360-nomination page will look like this –

360° Nominations For Adhira Adhira (Testing on 360 feedback report - 2024)



Note: Assignments will not be done if 'Max assignment count' exceeds for any rater.

Employee(s) nominated: 3, Declined: 1, Nomination(s) remaining: 1

Rater	Search Rater	Rater Group	Select Rater Group	+ Add
No.	Rater			
1	Raghav Raghav [0]			
2	Meera S [1]			 
3	Rani S [1]			 
4	Sachin Sachin [0]			

no green tickmark here

The rating column can be hidden altogether for the 360 section.

Appraisal

Include Archived Appraisals

Company Performance Review - 2023

Appraisal is published but inactive

Setup

Change Appraisal Status

Evaluation Areas

Configure Evaluation Areas

Configure Evaluation Areas - 360 Review

Set Due Dates

Assignments

Tools

Translation

Import

Administration

Design

Appraisal Design >> Setup

Evaluation Area Setup

Note: Kindly avoid setting RED color for Evaluation Area background as it may conflict with unfilled mandatory controls notification color.

Allow employee to add library items from pre-defined list

Allow employee to add new library items

In Search, show employee only the library items added by HR

Allow employees to Copy library items FROM other Evaluation Area

Allow employees to Copy library items TO other Evaluation Area

Set Access

Show Library Description

Hide Evaluation Area On Summary Page

Show Writing Assistant: Show Writing Assistant to All

Allow manager to add library items from pre-defined list

Allow manager to add new library items

Allow managers to edit library items added by employee

In Search, show manager only the library items added by HR

Allow all other roles same permission as manager

Allow managers to Copy library items FROM other Evaluation Area

Allow managers to Copy library items TO other Evaluation Area

Set Access

Show Observable Behavior

Hide Evaluation area if all controls are invisible

Review Report Settings

Hide Evaluation Area On Review Report

Print Library Description on Review Report

Print Observable Behavior on Review Report

360 Review Settings

360 Enabled

Library Item - Evaluator assignment available

Show Default Rating

Show '360 Rating' Column

Rating Scale: Observed Rating

Text-Based Rating: Select Text Based Rating

Review Page - Display Settings

Show 'Manager Rating' Column

Show 'Employee Rating' Column

Show Overall Score

Show Delete Button

Show 'Manager Weight' Column

Show 'Employee Weight' Column

Show 'Assigned By' Column

Show 'Assignment Date' Column

Show 'Modified Date' Column

Set As 'Default'

Title for Code: Competency

Save

Save & Close

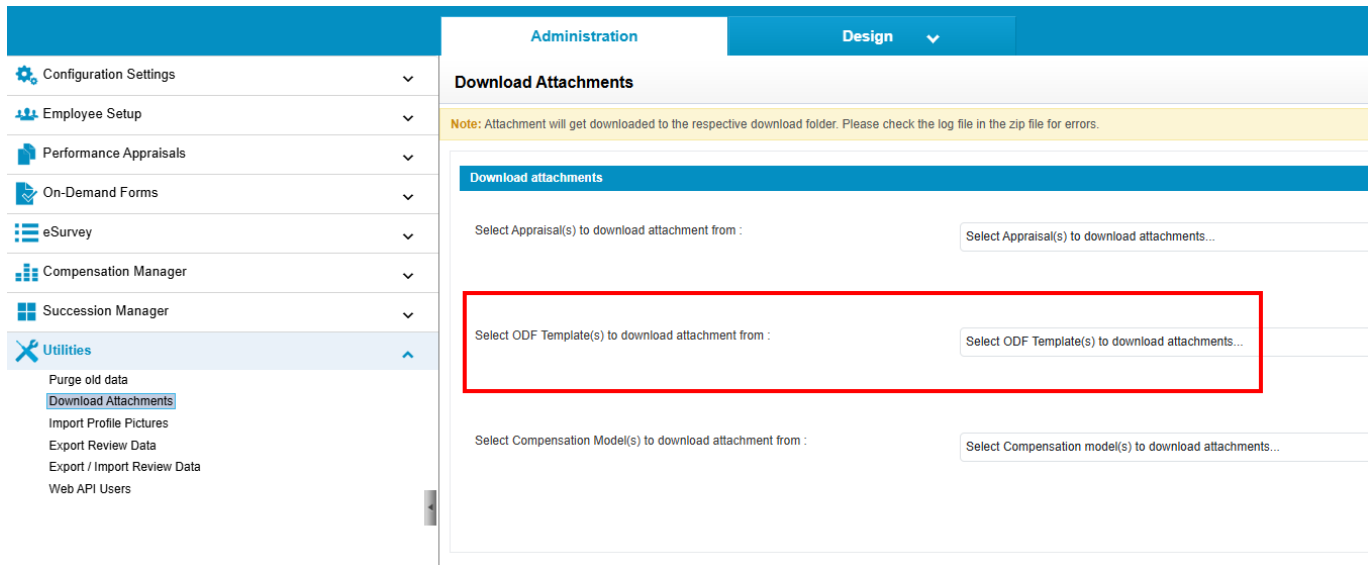
11

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On-Demand Forms Attachment Download

Allows users to easily retrieve uploaded documents for On-Demand Forms.



Administration **Design** ▾

Download Attachments

Note: Attachment will get downloaded to the respective download folder. Please check the log file in the zip file for errors.

Download attachments

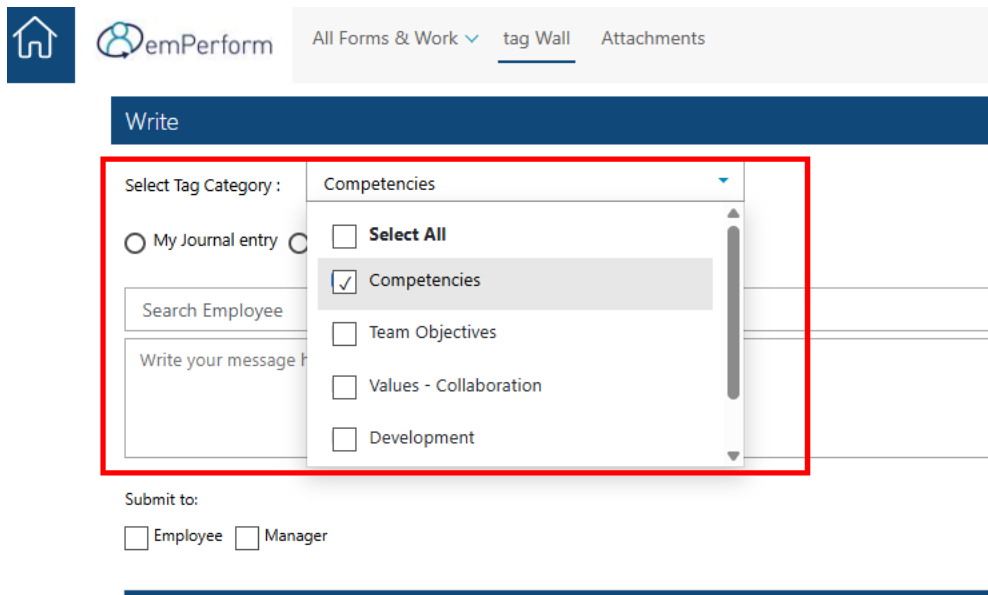
Select Appraisal(s) to download attachment from :

Select ODF Template(s) to download attachment from :

Select Compensation Model(s) to download attachment from :

Tag Wall Enhancements

Administrators can now categorize tags and share tagged content directly via email, fostering better engagement and recognition.



  All Forms & Work ▾ tag Wall Attachments

Write

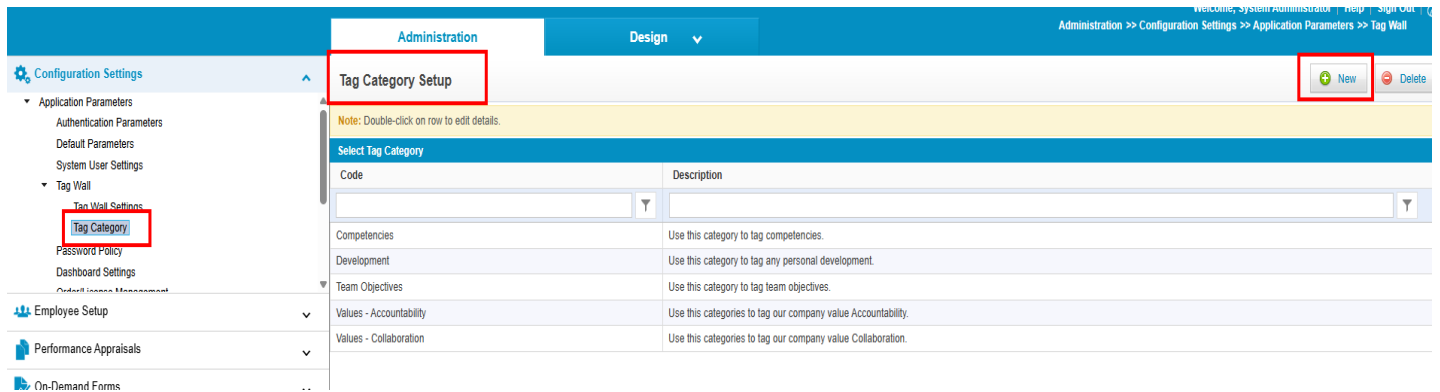
Select Tag Category :

☐ My Journal entry ☐

Write your message here

Submit to:

☐ Employee ☐ Manager



Administration

Design

Administration >> Configuration Settings >> Application Parameters >> Tag Wall

Configuration Settings

Application Parameters

Authentication Parameters

Default Parameters

System User Settings

Tag Wall

Tag Category

Tag Category Setup

Note: Double-click on row to edit details.

Select Tag Category

Code	Description
Competencies	Use this category to tag competencies.
Development	Use this category to tag any personal development.
Team Objectives	Use this category to tag team objectives.
Values - Accountability	Use this categories to tag our company value Accountability.
Values - Collaboration	Use this categories to tag our company value Collaboration.

Employee Setup

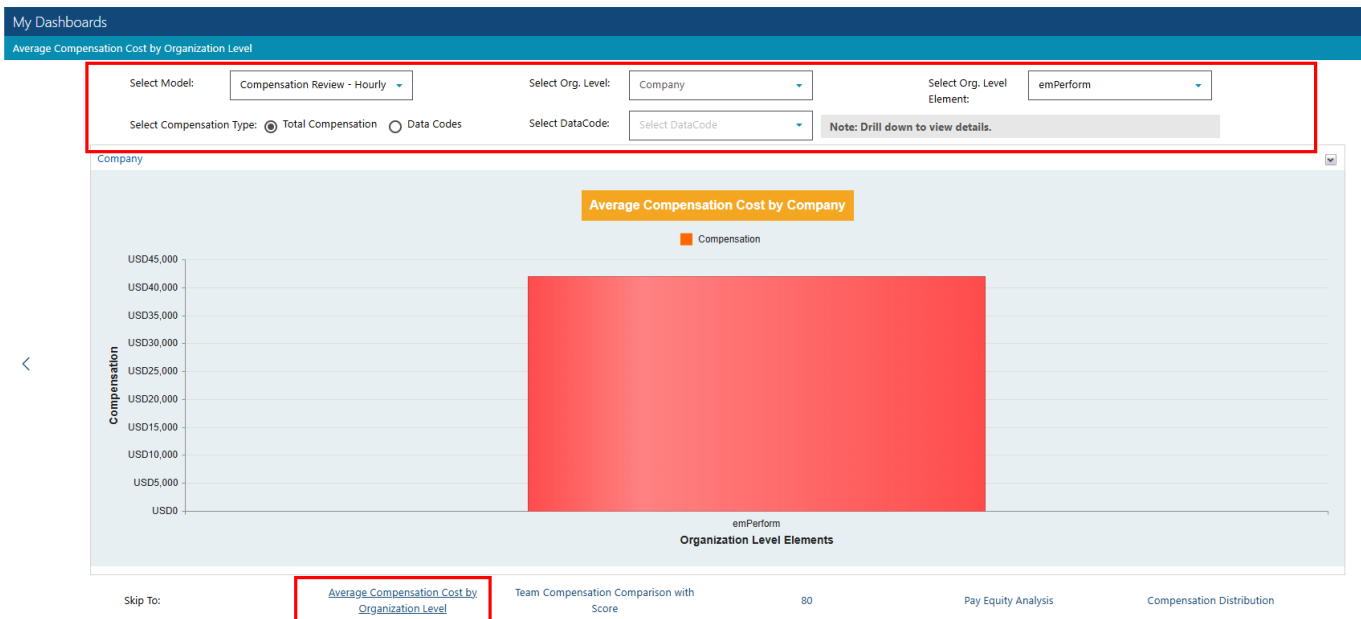
Performance Appraisals

On-Demand Forms

Compensation Dashboard Upgrades

New analytics view offers richer insight into pay and performance relationships:

- Average compensation by Organization Level
- Team compensation comparison with scores
- Compensation breakdown by level
- Pay equity analysis



My Dashboards

Team Compensation Comparison with Score

Select Model: Compensation Review - Hourly

Select Groups: All selected (2)

Select Employee: All selected (11)

Select Compensation Type: ☐ Total Compensation ☒ Data Codes

Select DataCode: All selected (2)

Note: Gray color indicates inactive employee(s).



Skip To: [Average Compensation Cost by Organization Level](#) [Team Compensation Comparison with Score](#) [Pay Equity Analysis](#) [Compensation Distribution](#)

My Dashboards

Pay Equity Analysis

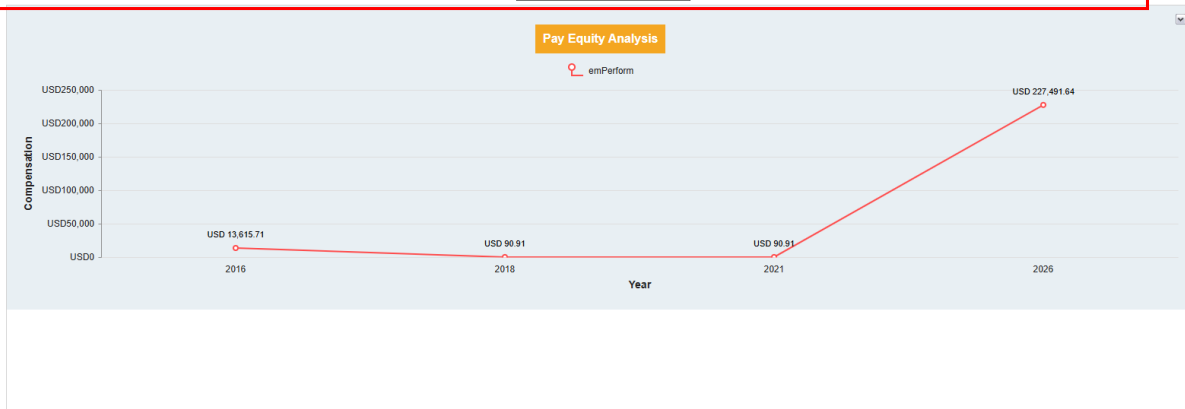
Select Org. Level: Company

Select Org. Level Element: emPerform

Select Model: All selected (4)

Select Compensation Type: ☐ Total Compensation ☒ Data Codes

Select DataCode: Bonus



Skip To: [Average Compensation Cost by Organization Level](#) [Team Compensation Comparison with Score](#) [Pay Equity Analysis](#) [Compensation Distribution](#)

Upgrade Instructions

For Hosted Customers:

If you are a hosted customer, you are asked to schedule an upgrade at your convenience. As part of the upgrade, you will also be asked to schedule a 15-minute meeting with a System Administrator to help guide you through the configuration of the new layout and settings.

→ [Schedule Your Upgrade](#)

For On-Premise Customers:

If you have emPerform deployed within your network, your IT department will need to download the update files and upgrade emPerform. To download the files, please refer to the email sent to you with the download links or contact us to secure the file downloads.

System Administrator Manuals

Access the updated Administrator user guide and training tutorials in the Administrator User Guide which you can access from within the Administrator Module:



We are thrilled to bring you this latest release of emPerform!

If you have any questions, please contact support: support@employee-performance.com