

Lattice Reviews FAQs

We've collected the most common questions we hear about preparing a review cycle in Lattice.



Creating Review Cycle Templates and Questions

Template FAQs

How do I create a template?

- Check out this article from our Help Center: [Creating Review Templates](#)

How do I have employees review goals in a template?

- Use this guide from our Help Center: [Evaluating Employees on their Goals in a Review](#)

What are best practices for creating my review questions and templates?

- Discover best practices here: [Preparing Questions to Ask in Your Review](#)

Question Bank FAQs

Why can't I edit my questions?

- Learn more with this article: [Editing Reviews Questions in "In-Use" Templates](#)
- And this article: [Editing Reviews Questions in non-"In-Use" Templates](#)

What do I do if I need to change questions in my reviews and I already launched?

- Use this guide in our Help Center: [How to Swap Review Templates in an Active Review](#)



Configuring Review Cycle Settings

Timeline FAQs

If I created a review cycle on a timeline and it is in the pre-launch state, is there a way to edit the kickoff email?

- At this time, you're unable to edit a kickoff email when the review cycle is in the pre-launch state. That being said, you can [duplicate the review cycle](#) and edit the kickoff email.

How do I move back to a custom timeline?

- See the instructions here: [How to Move a Review Cycle from Timeline to Manual](#)

Reviewer/Reviewee Setup FAQs:

If I have set up a dotted-line manager in the system, will that dotted-line manager automatically be pulled in to review that direct report (and potentially vice versa)?

- Unfortunately not at this time. This can be done manually though at any point after you create the review, from the “Reviews” tab. [Here is a quick video](#) to show you how to add dotted line managers.

How can I make sure I am only including employees before a certain start date?

- Lattice does not currently support adding employees by start date, but it is a feature on our roadmap. In the meantime, you can upload a CSV of employees you would like to receive reviews. This will not prevent employees that are not on the list from being pulled into the review as reviewers, but you can remove individuals prior to launching the review. [Here is a quick video](#) showing how to remove a reviewer from the cycle.

Review Settings FAQs:

When I start the manager writing phase, will all other reviews be locked?

- Selecting “[begin manager reviews](#)” will simply open any locked manager reviews. This will not close any other reviews.

If I enable “White reviews are ongoing, managers can preview reviews written about their direct reports”, does this mean the reviews are in draft or submitted?

- Managers will only be able to view the reviews once they are submitted. Draft reviews will not be visible.

Deliverables FAQs:

When will the manager write the summary?

- Managers will write their summary once the review is ended and all other reviews have been submitted. [Here is an overview of the different review response options](#) for managers during the review.

Can I customize the summary questions and format?

- Unfortunately not at this time. The summary will be an option comment box that reads “Your Summary”. This [article](#) includes an image and details of the summary process.

What happens if a manager only has one direct report and I select for responses to be anonymous?

- *The responses will still be shared with the manager “anonymously”, however the manager will know who wrote the responses. The system does not have a way to monitor this. [Here’s an article](#) that talks through the Deliverables settings available for Admins.*

Weighted Score FAQs:

Can I have more than one weighted score?

- *You can only have one weighted score in Lattice at this time.*

How is the weighted score calculated?

- *[Weighted scores](#) can be calculated in whatever fashion fits your review. If you are using any ratings or scores in Lattice, they can be exported into a CSV and used to create your weighted score. Please note, there is no automatic weighting done in Lattice.*

Where does the weighted score appear in the review packet?

- *If you choose to include the weighted score in the review packet, it will appear at the top of the review and say “weighted score”. You are able to add a description as well during the review setup which will appear with the score. [Here is an example](#) of a weighted score in a review packet.*

Calibration FAQs:

Can I do this after the review is shared?

- *[Calibration](#) can be done at anytime and scores can be updated at any point in the review process.*

Can managers do this?

- *By default, only Admins can calibrate. That said, you can create a custom role for a particular individual to allow them to calibrate reviews! [Here is a guide](#) walking through how to set up calibration permissions in a custom role.*

Where do I get the template?

- *[Here is an article](#) that will walk you through all of the steps of calibration, including downloading the template out of Lattice.*

Are there limitations on the scores?

- Yes, please keep in mind that calibrated scores need to be whole numbers.

Is this score shared with the reviewee?

- This is dependent on your share settings. This is determined under the “deliverables” section during review setup. If you’ve launched, [here is a quick video](#) with the steps to confirm your settings.

How do I do calibration?

- Calibration helps ensure that employees being reviewed are all evaluated together, on the same scale, as often times different managers have different scoring interpretations. Here is an article from our people resources library on the “[How and Why of Calibration](#)”, that outlines the basics of calibration.

Scored Attribute FAQs:

Why would I use this instead of a rating question?

- If you plan to calibrate your scores or tie them to an engagement survey then we recommend using scored attributes, rather than rating questions. Please note that score attributes are only completed by managers though.

Where does this show up in the review?

- Scored attributes can optionally be shared with reviewees in their packets, but will appear at the top of the review packet. Here is an outline of “[Sharing Review Scores](#)”



Managing a Review Cycle

Peer Selection

How do I prevent someone from getting too many peer requests?

- There isn’t a way to limit the number of peer selections someone can receive in the system, but allowing individuals to [reject nominations](#) and keeping the limit of nominations between 3-5 is recommended. This article outlines “[Peer Selection Limits](#)”.

Writing Phase:

How do I add dotted line managers/reports?

- Follow these instructions here: [Adding a Late Reviewer to a Review Cycle](#)

How can I change someone's manager for the review?

- Follow these instructions here: [Changing Managers Mid Review](#)

What happens if someone's manager changes mid-review?

- See this guide in the Help Center: [Changing Manager Responsibilities During a Review](#)

How can I see the amount of reviews that have been written in a phase?

- This article [here](#) walks through in progress participation reporting in Reviews.



Post Review

Sharing FAQs:

When is the review shared?

- Reviews are shared on a one by one basis by managers once the review is ended. Alternately, admins can also share all reviews at once. Reviews will not automatically be shared once submitted.

What do the share statuses mean?

- Check out this article from our Help Center: [Ended Review Cycle Status](#)

Reopening Review FAQs:

Is there a way to mass reopen reviews in a review cycle?

- Unfortunately not at this time, but here is [how to reopen a single review](#).

If I reopen a review, do I have to close it again?

- Yes, once the review is completed the review will need to be closed again. The end of this [article walks through how to close the review after reopening](#).



Review Cycle Analytics

How to I read and analyze my review results?

- Follow this guide in our Help Center here: [Understanding Review Analytics](#)

