WORKFORCE ONE

Performance Reviews

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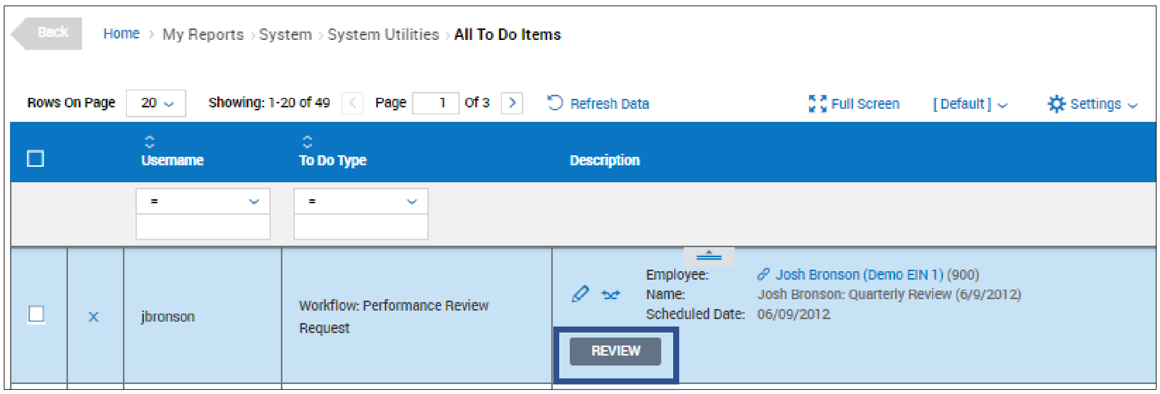
Performance Reviews

Performance reviews can be completed online and are customizable allowing for multiple manager reviews as well as self-review. The questions and answer choices in the performance review are also customizable to your needs. In addition to demonstrating performance reviews, we'll show you how to create goals for your employees (based on a particular time period).

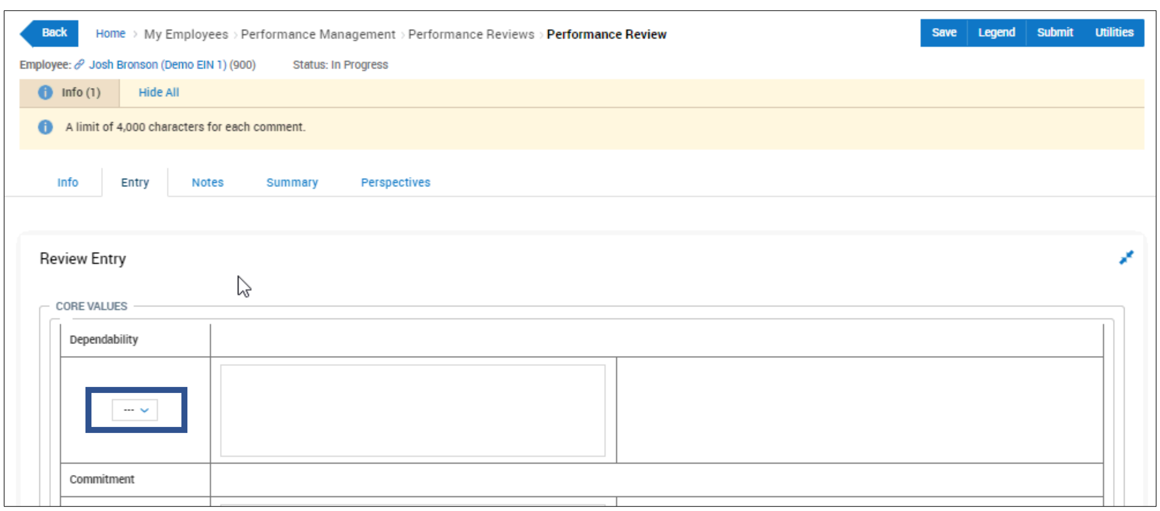
Workflows are customized to allowing you to choose when you review your employees. Once that date is met, managers would see their bell with a number on it indicating they had things to do, like performance reviews.

How to Fill Out a Performance Review

1. Select the  to start a review.
   The window below displays.

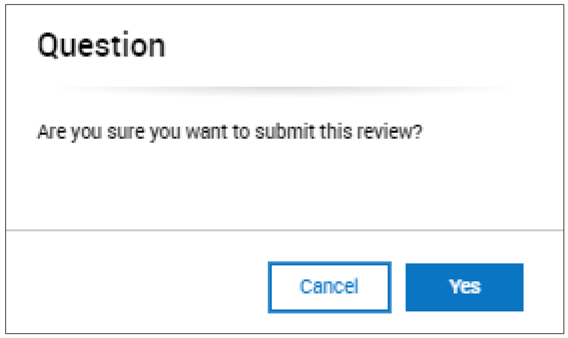


2. Select the **Review** button to begin.
   The window below displays. This is the area where you will fill out the review. Core values, competencies, and goals can all be customized in HR Setup.



3. Under Core Values, select the appropriate option under the drop down (these are also customizable options.)
4. Enter any descriptive text to explain why you chose the drop-down option. This is not a required field.
5. Continue through the review until complete.

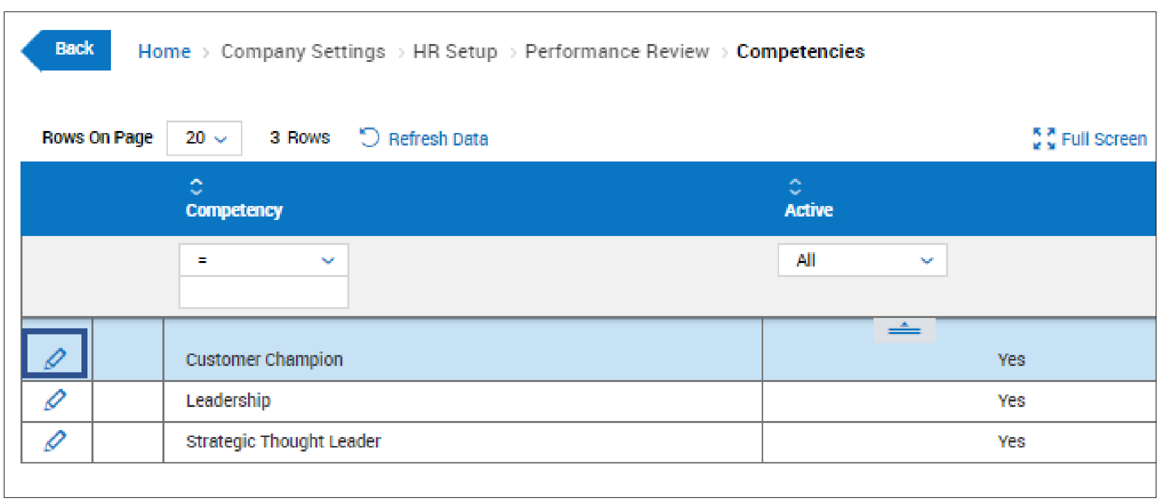
If you want to save your work to complete the review later, select **Save**. This will not submit the review to the next reviewer in line. It's simply a way for you to save and return to finish it later. If you want to submit the review to the next level, select **Submit**. If you select submit you will receive the following popup menu.



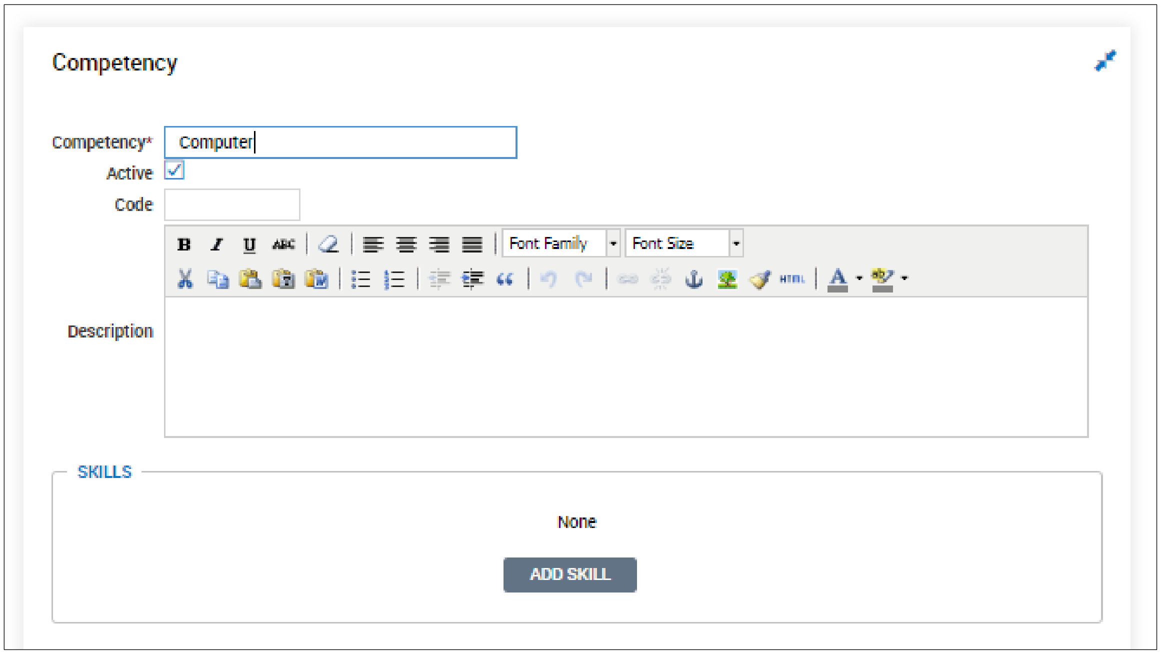
6. Select **Yes** to push the review forward to the next manager in line to review it.

How to Customize Performance Reviews

1. Select the hamburger menu.
2. Select **Company Settings**.
3. Select **HR Setup**.
4. Select **Performance Review**.
5. Select **Competencies**.
   The window below is displayed.

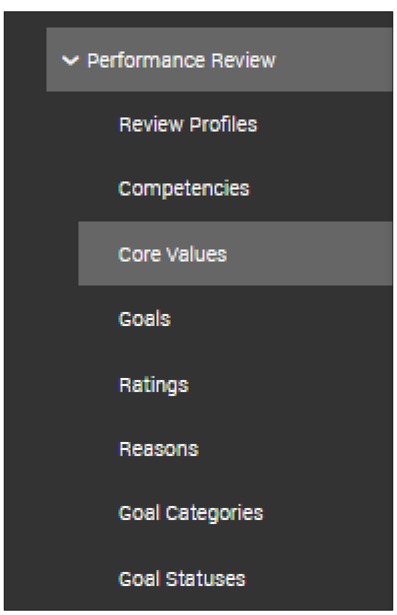


6. Select the pencil icon to make edits to the competency.
7. Select the **Add New** button on the top right corner to create a new competency.
   The window below is displayed.



8. Enter all the applicable information regarding the competency you want to include on the review.
9. Select the **Save** button on the top right corner.
10. Select **Back**.

Adding Core Values, Goals, etc., are all the same process and under the same **Performance Review** menu option as shown below.

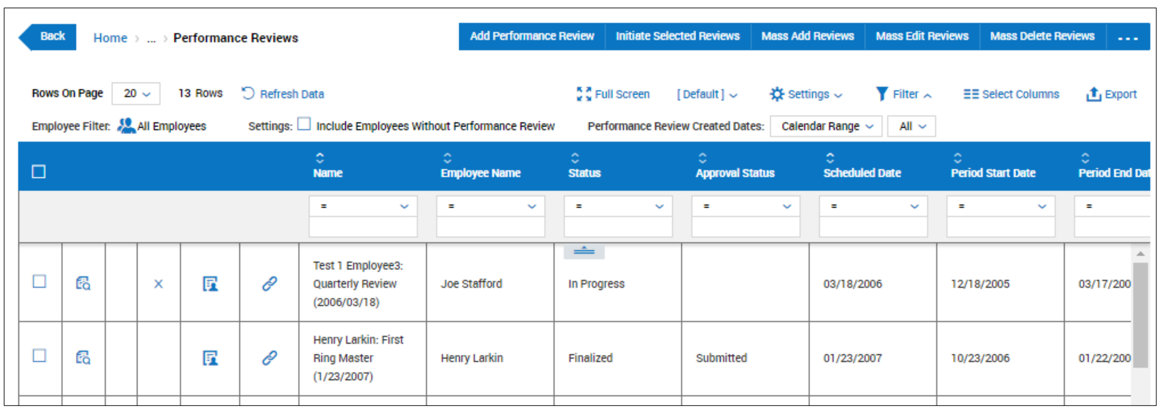


Performance Review Report

This report will display the details of performance reviews such as Entry Comments, General Comments, Core Values, Goals, Competencies, Review Rating, Finalizer and Notes. From this report, managers can view a performance score prior to the finalization of the review. The Review Step Final Average and Overall Final Average can be added by clicking Select Columns and then adding the columns from the Available Columns section.

1. Select the hamburger menu.
2. Select **My Reports**.
3. Select **HR**.
4. Select **Performance Reviews Report**.

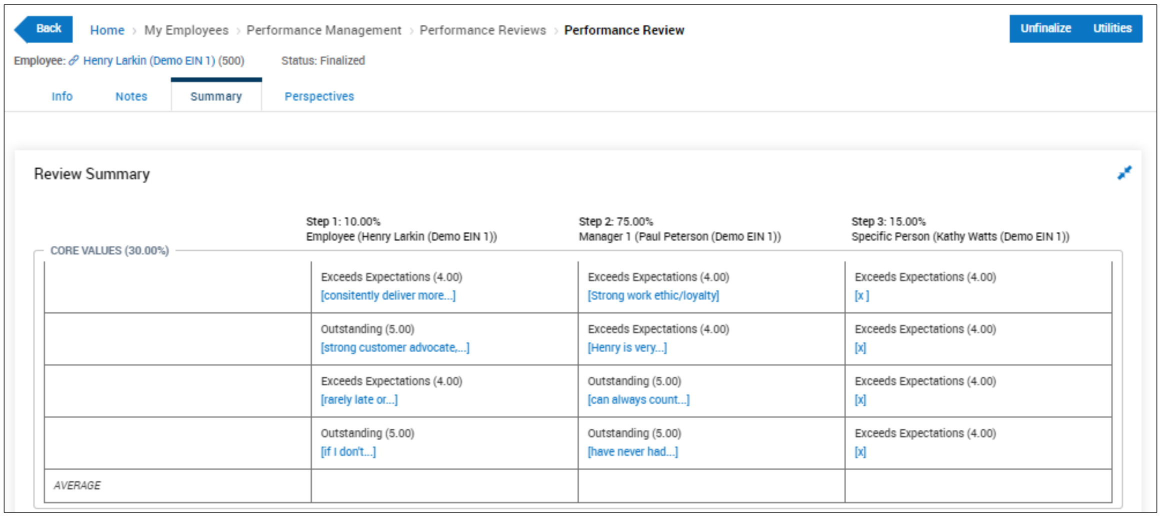
   The window below is displayed.



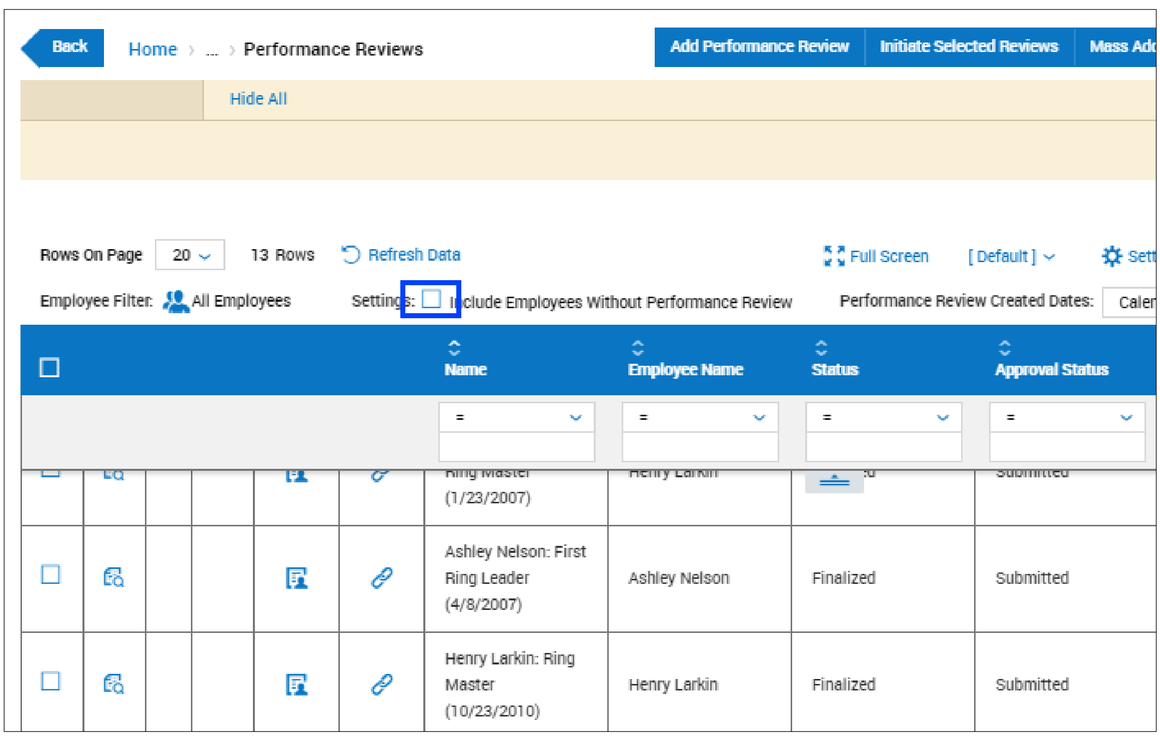
This report will display the status of all the reviews, allow you to make changes to reviews, see which reviews need to still be completed, or finalized.

5. Select this button to jump to the details of the review for an individual.
6. Select the **Summary** tab to view the information all in one location.

   The window below is displayed.



This is the summary of their entire review, what the employee wrote about themselves, and their two managers. Scroll to the bottom to see the final comments, new compensation, and job title. Select the **Back** button to return the review list.



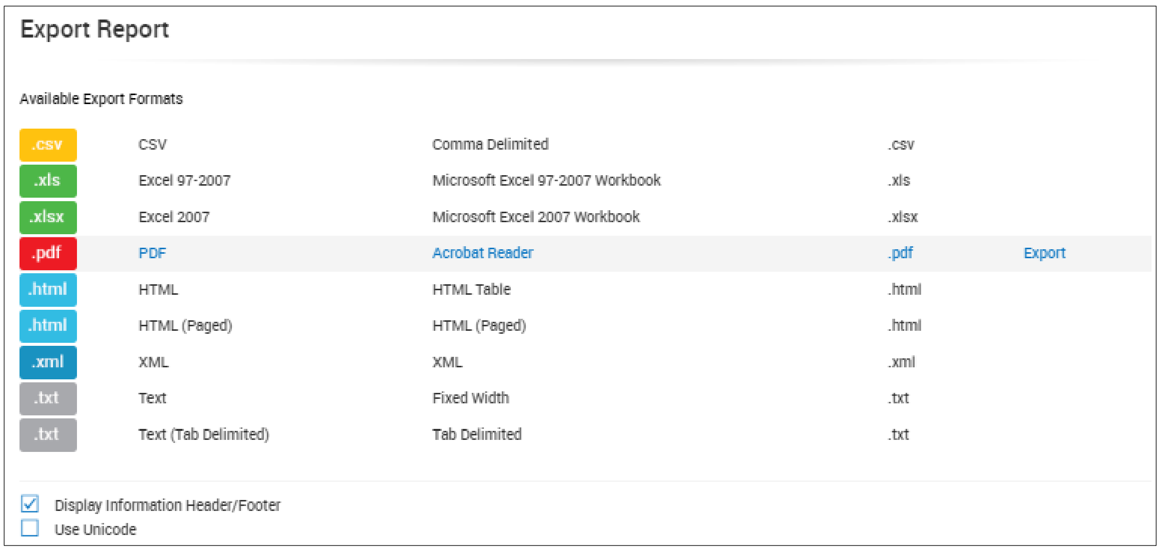
7. Select the checkbox, highlighted above, to display all employees who do not have a performance review completed.

You have completed reviewing the Performance Review report.

Exporting Reviews

Let's export all the performance reviews.

1. From the Performance Reviews page, select the export button on the top right corner.
   The popup window displays.



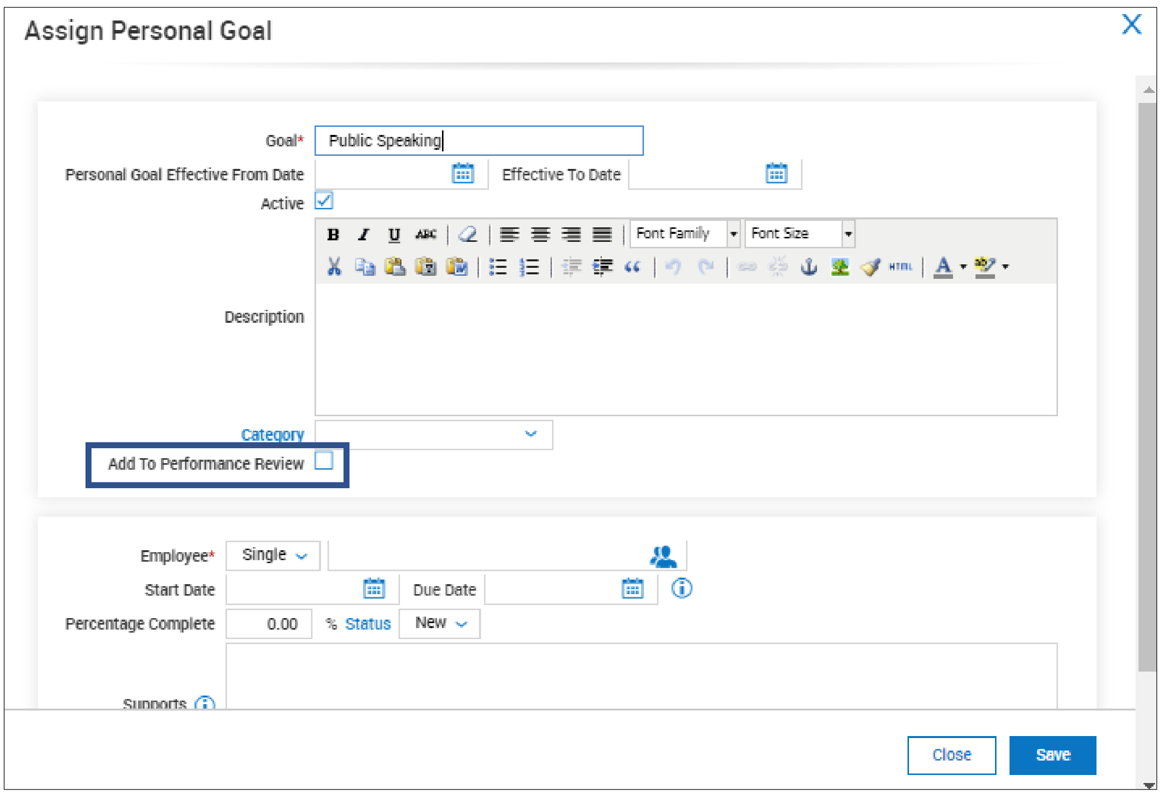
2. Select the PDF option.
3. From the bottom of the browser window, select the file to open.

You have completed the exporting process.

Setting up a Personal Goal

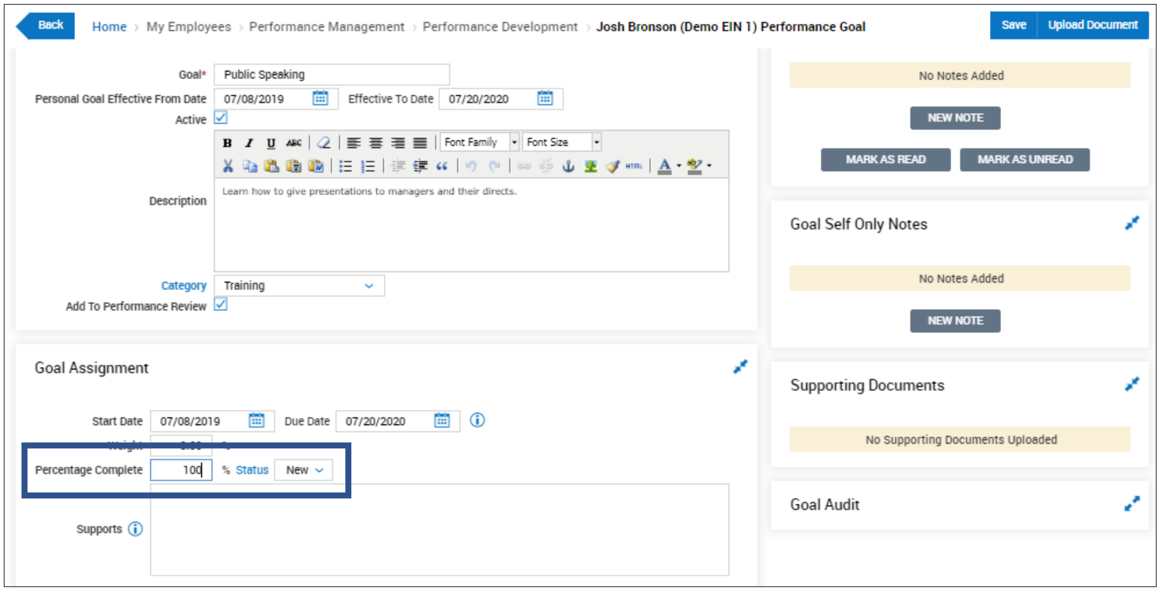
Let's assume we've reviewed our employees and want to create new goals for the upcoming year. We can do this from the Performance Development Report. You can assign them to a group of people or one at a time. Let's look at this feature now.

1. Select the hamburger menu.
2. Select **My Employees**.
3. Select **Performance Management**.
4. Select **Performance Development**.
5. Select the **Assign Personal Goal** button.
   The window below displays.

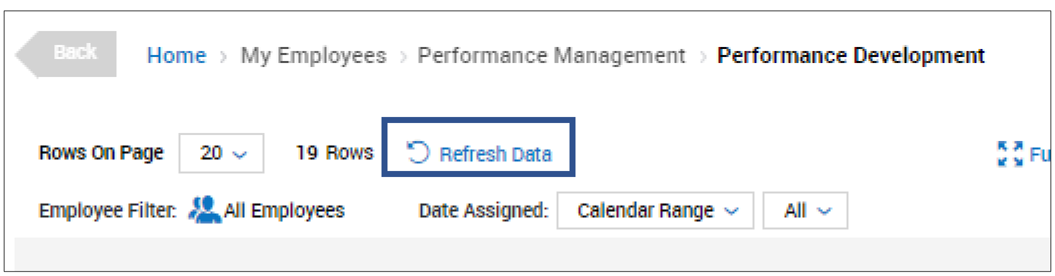


6. Fill out the popup window with the applicable information.
7. Select **Add To Performance Review**.
8. Select the  to select an individual or group of employees.
9. Select **Add Selected**.
10. Select **Use Filter**.
11. Apply a start and due date.
12. Select **Save**.

Now that you've returned to the Performance Development window, you can see that the goal has been applied to those individuals you selected. As progress develops on the goal, select the pencil icon next to the individual.



13. Select the **Save** button.
14. Select **Back**.



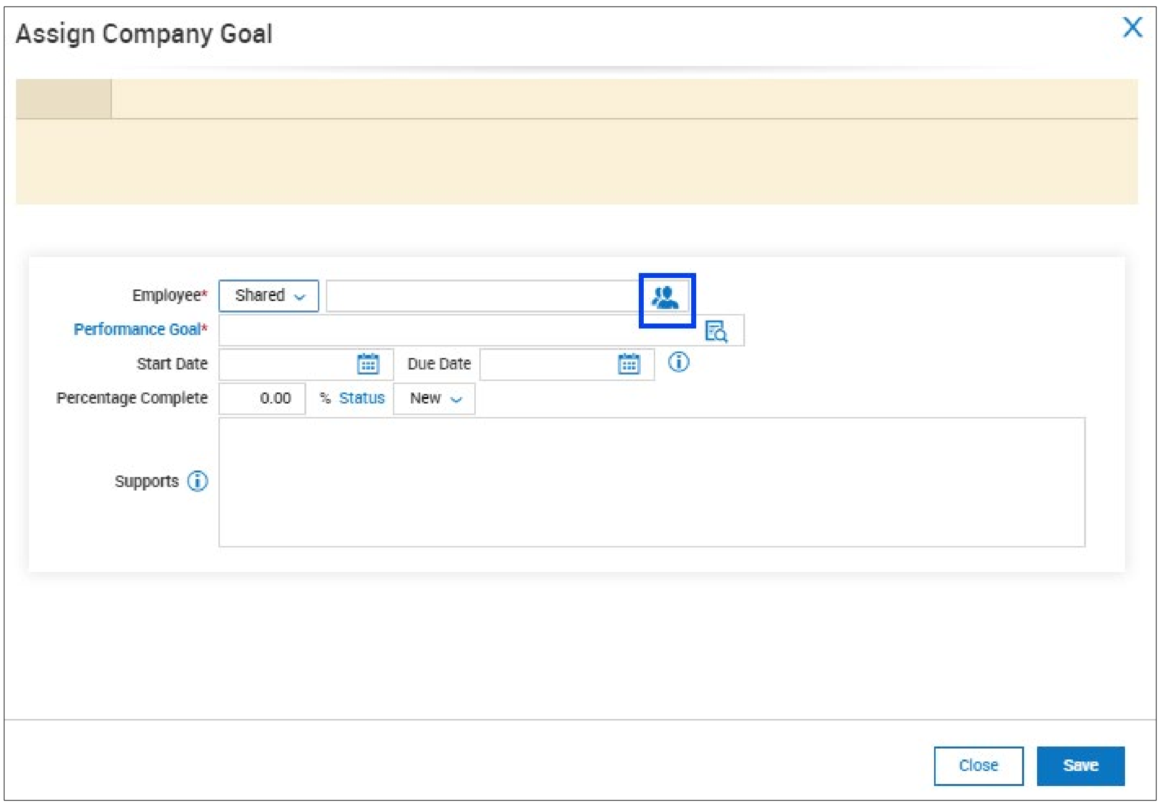
15. Select **Refresh Data** to see the updated information displayed.

You have completed the individual goal set up process.

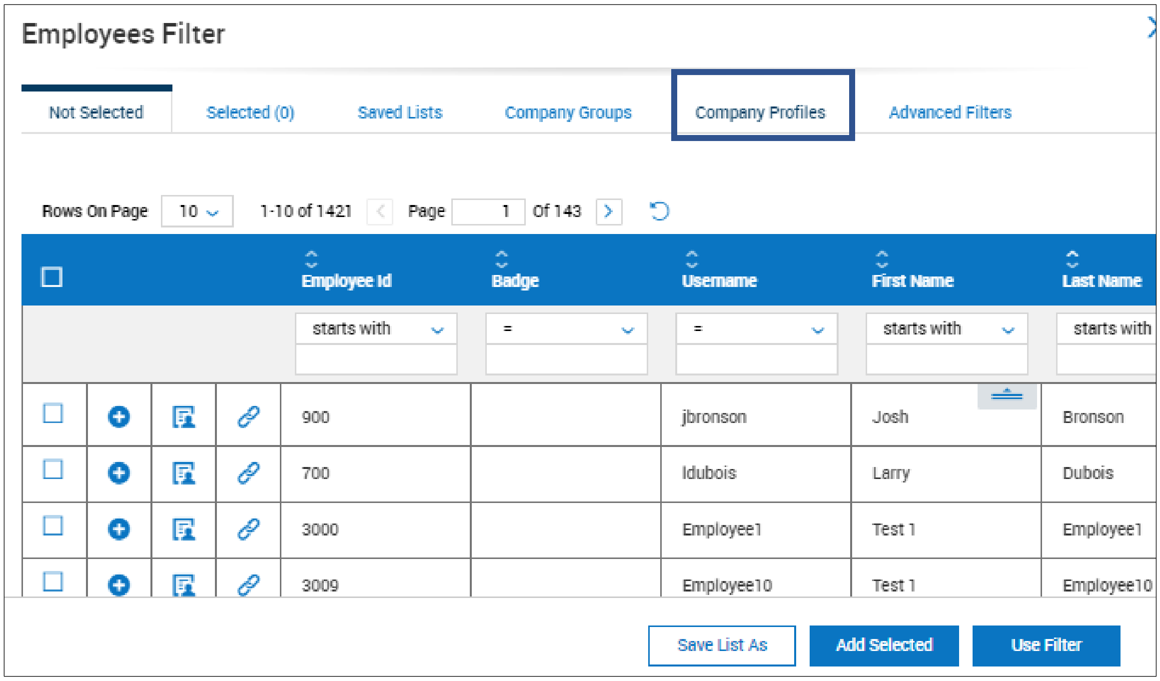
Assign a Company Goal

Now let's assign a company goal.

1. Select the hamburger menu.
2. Select **My Employees**.
3. Select **Performance Management**.
4. Select **Performance Development**.
5. Select the **Assign Company Goal** button.
   The window below displays.



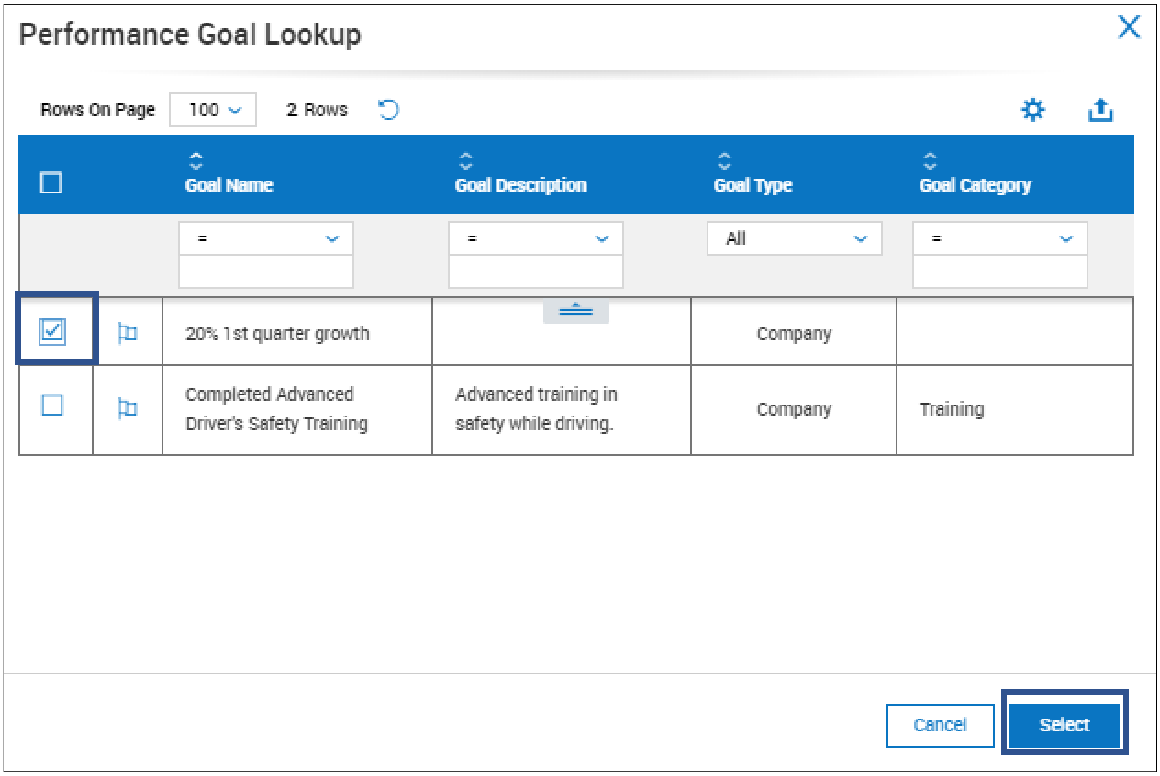
6. Select the drop down next to employee and select the **Shared** option.
7. Select the icon highlighted above to select your employees.
   The window displays below.



8. Select **Company Profiles**.
9. Choose the flag icon next to the profile you want to select.

Please note that a shared goal implies that everyone is working on it, as a group, at the same pace. So, when you update the percentage complete to one person, it applies that same percentage to all those who share that goal.

10. Select **Save**.
    The window below displays.



11. Select the checkbox next to the newly created goal (20% 1st Quarter Growth).
12. Select **Save**.
13. Apply a start and due date.
14. Select **Save**.

You have completed the company goal set up process.