

Performance Review User Guide



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Performance Review Introduction

Performance Review functionality allows an HR user to track performance reviews within the HR Campus application. This process is required to ensure that legislative reporting requirements are met.

Performance Review tracking will allow for entry of previous and future performance reviews, including scheduled review dates, review completion dates, and types of review into the HR Campus application. Search functionality is also available to allow you to view a list of reviews that are due in a particular time period so that notifications can be sent to supervisors or to retrieve a list of employees whose review dates may be updated as part of a batch process.

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Security

You need the following security roles:

HR_CAMPUS_HR_PROCESSOR **View, Add, Edit, Delete**

HR_VIEWER **View Only**

Performance Review for an Individual Employee

Individual employee performance review information will be maintained on the *Reviews* tab in the HR Campus application.

NOTE – Only two years from the current date will be displayed in HR-Campus. Previous years can still be viewed via Performance Review Search or EPM11 reporting.

A screenshot of the HR Campus application interface. At the top, there are navigation tabs: Profile, Employment, Jobs, Leave, Reviews (selected), and Credentials. A 'SCUPPS' button is visible in the top right corner. Below the tabs, the 'Reviews' section is displayed. It features a title 'Performance Review' with a dropdown arrow. A note below the title states: 'NOTE – Only performance review records with a Scheduled Date within two years from the current date will be displayed under an employee's Review tab. Records older than two years can be viewed via the Performance Review Search page.' Below the note is a table with columns: Job, Review Type, Scheduled Date, Reviewer, and Completion Date. To the right of the table are two buttons: 'Download in Excel' and '+ Add Performance Review'.

How to Create a Performance Review Event

1. Go to the **Review** tab for an employee.
2. Select the **Add Performance Review** button.

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Add/Edit Performance Review

*Job
<Please select>

*Type
<Please select>

*Scheduled Date
Example: 12/03/1983

Reviewer
<Please select>

Completion Date
Example: 12/03/1983

Save Cancel

- 3. Select *Job* from the drop down.
- 4. Choose the *Review Type* from the dropdown list. Review types are:

Review Type	Description
Annual	Annual review which is not tied to an employee receiving a salary increase. (Contractual requirement)
Mid-point Probation	Review processed at the end mid-point of a probation period.
Off-cycle	This type indicates that the review is being processed outside of the normal annual review schedule.
Probation End	Review processed at the end of a probation period.
Probation Extension	Extending an employee's probation end date review date.
Step Increase	A performance review processed to support a step increase.

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5. Enter a *Scheduled Review Date*. If you select *Annual* as the *Review type*, you may accept the default *Scheduled Review Date*, which is 1 year from today's date, or enter a different date (Date format is mm/dd/yyyy).

NOTE: if you select Annual – The Scheduled Review Date will automatically populate with a date 1 year from today's date if a new record, or from the previous date if adding a another record. You may change this date.

6. Enter the *Reviewer* name. A dropdown list will appear when you begin to type in this field. Choose the name from dropdown list by clicking on the name.

NOTE: The Reviewer cannot be the employee whose record is being created or modified.

7. If you are entering a historic record, enter the *Review Completion date* (Date format is mm/dd/yyyy), otherwise leave the date blank until the review has been completed. You may not enter a future date in this field.

8. Click on the Save button.

The screenshot shows a web interface for performance reviews. At the top, there's a 'Reviews' tab and a 'Performance Review' section with a dropdown arrow. Below this is a note: 'NOTE - Only performance review records with a Scheduled Date within two years from the current date will be displayed under an employee's Review tab. Records older than two years can be viewed via the Performance Review Search page.' There are two buttons: 'Download in Excel' and '+ Add Performance Review'. Below the buttons is a table with columns: Job, Review Type, Scheduled Date, Reviewer, and Completion Date. The table contains one row: Job: '1 - Information Systems Manager', Review Type: 'Annual', Scheduled Date: '01/25/2017', Reviewer: 'Strub, Malcolm Mike', Completion Date: '02/09/2017'. There are 'Edit' and 'Delete' buttons under the Job column.

Job	Review Type	Scheduled Date	Reviewer	Completion Date
1 - Information Systems Manager	Annual	01/25/2017	Strub, Malcolm Mike	02/09/2017

How to Edit a Performance Review Event

1. Go to the **Reviews** tab for an employee.
2. Select the **Add Performance Review** button.
3. Click on the Edit button for the record you want to edit.
4. Edit the Review Type, Scheduled Review Date, Reviewer, or Review Completion Date (Date format is mm/dd/yyyy).
5. Click on the Save button.

How to Delete a Performance Review Event

1. Go to the **Reviews** tab for an employee.
2. Select the **Add Performance Review** button.
3. Click on the Delete button and the record will be deleted.
4. A message frame will appear to confirm that you want to delete, you must either choose *Delete this review*, or *Cancel*.

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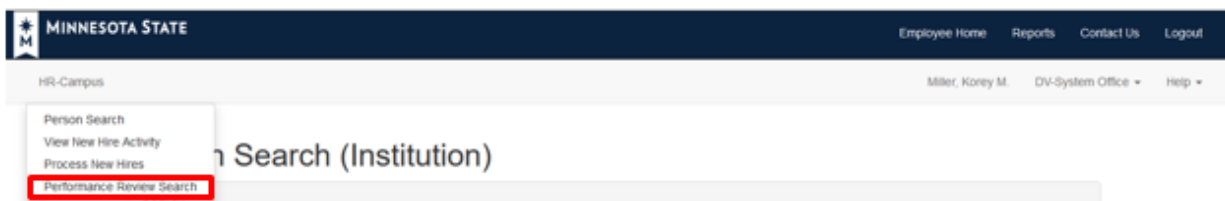


Field Names and Descriptions

Field Name	Description
Review Type	Indicates the reason for the performance review.
Scheduled Review Date	Date on which the completed performance review is due.
Reviewer	The person who conducted the performance review. This is typically the employee's direct supervisor.
Review Completion Date	Date on which the performance review was actually completed

Performance Review Search

You may search for and manage batches or groups of data by selecting Performance Review Search in the left navigation dropdown in HR Campus. This screen will be used to search for groups or lists of reviews that may then be updated, modified or if necessary, deleted.



How to Search on the Performance Review Search screen

Performance Review Search

Search

Search for employees with: existing performance review no performance review

At least one filter is required.

Review Type

<Please select>

Scheduled Date Range

From: Example: 12/03/1983

To: Example: 12/03/1983

Supervisor

Employee

Hide Completed Reviews

Search Clear

1. Go to the **Performance Review** page under the left navigation.

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2. In order to obtain results in your search, you must enter at least one search parameter. You may either choose a review type from the drop-down, enter a From: date, a To: date, or a range of dates, or you may enter a Supervisor name.
3. To search for a specific Review Type, select one from the drop-down. You may leave this field blank.
4. Enter a From: date using the mm/dd/yyyy format or select the date from the calendar. You may leave this field blank.
5. Enter a To: date using the mm/dd/yyyy format or select the date from the calendar. You may leave this field blank.
6. Supervisor Name - Begin to type the Supervisor Name. A dropdown list will appear when you begin to type in this field. Choose the name from dropdown list by clicking on the name. This is the Supervisor listed on the Jobs Tab for the employee. You may leave this field blank for a list of all supervisors for a specific type or date parameter.
7. If you want to limit the search to only see reviews that have not been completed, click the checkbox next to **Hide completed reviews**.
8. Click on the *Search* box.
 - **NOTE:** You must click on the Search box each time you modify the search parameters to ensure that you are receiving the expected results.

Search Field Names and Descriptions

Field Name	Description
Review Type	Indicates the reason for the performance review.
Date Range From:	The beginning scheduled review date that you would like the search to begin with.
Date Range To:	The scheduled review date that you would like the search to end with.
Supervisor:	The supervisor of the employee that is listed on the Jobs tab.

Performance Review Search Results

The results listed on the search screen are dependent on the parameters chosen. Once you have results, you may review, edit, add or delete records depending on your security. You may also change your search by choosing at least one different parameter. Each time you change a search parameter, you will need to select the search button to see new results.

- **NOTE:** At least one search field must be completed to receive search results.

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Results Download in Excel

	Employee Name ^	Job	Supervisor	Review Type ^	Scheduled Date ^	Completion Date ^	Reviewer ^	
Delete	Scilla,Royal Mike	0	Bahn,Clair Mike	Annual	02/14/2014	02/14/2014	Elsbree,Maisie Florence	Edit Add
Delete	Warmbier,Jewel Mike	0	Bahn,Clair Mike	Annual	02/14/2014	02/14/2014	Elsbree,Maisie Florence	Edit Add
Delete	Scilla,Royal Mike	0	Bahn,Clair Mike	Annual	12/31/2014	05/06/2015	Milhomme,Shane Florence	Edit Add
Delete	Warmbier,Jewel Mike	0	Bahn,Clair Mike	Annual	12/31/2014	05/06/2015	Milhomme,Shane Florence	Edit Add
Delete	Rygg,Cordeil Mike	0	Bahn,Clair Mike	Annual	12/31/2014	05/06/2015	Milhomme,Shane Florence	Edit Add
Delete	Burri,Deshawn Mike	0	Bahn,Clair Mike	Annual	06/30/2015	06/26/2015	Messamore,Gerald	Edit Add
Delete	Gemmell,Rickie Mike	0	Bahn,Clair Mike	Annual	09/04/2015	01/01/2016	Abdo,Hilario	Edit Add
Delete	Scilla,Royal Mike	0	Bahn,Clair Mike	Annual	12/31/2015			Edit Add

The default search results display is by Scheduled Date ascending. Once the results are displayed, you may sort by Employee Name, Supervisor, Review Type, Scheduled Date, Completion Date or Reviewer in either ascending or descending order.

Search Results Field Names and Descriptions

	Field Name	Description
1	Employee Name	Last name, First name, Middle name of the Employee.
2	Job	The SEMA4-assigned employee job record number. If SEMA4 has yet to assign the value, it is 9999.
3	Supervisor	This is the supervisor of the employee listed on the Jobs tab.
4	Review Type	Indicates the reason for the performance review.
5	Scheduled Date	Date on which the completed performance review is due.
6	Completion Date	Date on which the performance review was actually completed.
7	Reviewer	The person who conducted the performance review. This is typically the employee's direct supervisor.
8	Edit or Add Icons	Choose the Edit Icon to edit the entry or Add to add another record.

How to enter or update records on the Performance Review Search screen.

1. Go to the **Performance Review Search** page in the left navigation bar.

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2. Search for records by following the above steps in **How to Search on the Performance Review Search screen**.
3. To **add** a record for an employee in the list, click on the **Add** icon. This will bring up a *Create* box that includes the employee's name and job number and a copy of the record you selected. You may modify the Review type and Scheduled review date and you may add a Reviewer and Review completion date.
4. To **edit** a record, click on the **Edit** icon. This will bring up an *Edit* box that includes the employee's name and job number and a copy of the record you selected. You may modify the Review type and Scheduled review date and you may add or modify the Reviewer and Review completion date.
5. To **delete** a record in the search results, click on the **Delete** icon to the left of the record. You will be asked "Are you sure you want to delete this item?", and you can choose ok to delete, or cancel to prevent deleting the record.

Downloading Search Results to an Excel Spreadsheet

You may download the search results into an Excel spreadsheet by selecting the Download in Excel icon above the search results.

Performance Review Search

The screenshot shows a search interface with a 'Search' input field and a 'Results' section. The results are displayed in a table with columns for Employee Name, Job, Supervisor, Review Type, Scheduled Date, Completion Date, and Reviewer. A 'Download in Excel' button is highlighted with a red box in the top right corner of the results area. Below the table, there are 'Delete', 'Edit', and 'Add' buttons for each record.

Employee Name ^	Job v	Supervisor	Review Type ^	Scheduled Date ^	Completion Date ^	Reviewer ^
Wambier,Jewel Mike	0	Bahn,Clair Mike	Annual	02/14/2014	02/14/2014	Elsbree,Maisie Florence

Questions or Help?

If you need additional assistance, please contact the Minnesota State Help IT Service Desk Portal.

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