February 25, 2015

**We are excited to announce the start of Performance Reviews on the ADP Web site.**

**This Step-By-Step Guide will walk you through completing the performance review process. The performance review period is Thursday, February 26, 2015 and must be completed no later than March 26, 2015 by 4:00 p.m.**

**Everyone MUST Login to the Web Site**
**PLESE READ, READ, READ INSTRUCTIONS CAREFULLY**

**FOR SUPERVISOR**

## About the Performance Review Status

The status of a scheduled review changes throughout the performance review process as follows.

| Status | Description |
|---|---|
| Not Started | The Owner (Practitioner or Manager) starts the review and assigns contributors and goals to the review, if necessary. |
| In Progress | The review is set up and the Owner (Manager or Practitioner) of the review begins the review. |
| Pending Approval | The Owner submits the review and another reviewer needs to approve the review. |
| Rejected | A reviewer rejected the review. |
| Approved | The final reviewer has approved the review. |
| Pending Employee Acknowledgement | The employee needs to acknowledge the review for the review to be completed. |
| Completed | The employee acknowledged the review, if an acknowledgement is required.<br>A review status of completed is also displayed after a review is submitted, if an approval or an acknowledgement is not required, or if the Release to Employee option is set to Do Not Release during set up. |

## Adding Contributors to a Performance Review and Starting a Current Review

Contributors are the employees you select to provide feedback on an employee's review. You can set up the contributors for a review during the Start Review process. You select the following roles and add the employee associated with those roles to make up the contributor list:

- Employee - The employee who is being reviewed. (Select this role if you want the employee to provide a self-assessment.)

Managers with access rights will start a performance review. Managers will have ownership of the performance review and the ability to contribute to reviews for their direct reports. When you start a performance review, you add the employees whom you want to provide feedback on the review.

**My Team** > **Talent** > **Performance Reviews** > **Current Reviews**

1 In the **Filter By** field, select **Status** and filter the list of employee reviews with a status of **Not Started.**

2 After you locate the review you want, click the **Action** icon and select **Start Review**.

3 In the **Contributors** section, add contributors:

a Click **Add Contributors** and select the role of the employees you want to add as contributors for the review. Select Employee-Self Assessment. The employees name will then appear.

b Select the employee you want to add as a contributor for each role and click **Done**.

5 Select the **Due Date** for contributors to provide feedback. Also select the date for the reminder notification to be sent to the contributors. Example Due Date March 20, 2015 and Reminder Date March 16, 2015.

6 In the **Goals** section add or remove goals from the employee's review. **At this time bypass this section on the review because 2014 Goals are address as a question that requires comments.**

**See section CREATING A PERSONAL GOAL to enter new goals that will be reviewed in 2016.** These goals must be monitored throughout 2015-2016 and completion dates entered. As goals are completed the percentage bar will increase to inform employee and supervisor progress of the goals. Both Supervisor and Employee will complete this section.

7 In the **Attachments** section, if necessary, click **Add (+)** to upload one or more attachments to the review and do the following:
You can have a maximum of 5 attachments on a performance review. The file size limit is 512 KB.

a Click **Add Files** and navigate to the directory where the file is located.

b Select the file and click **Open**, to add it to the Files list.

c Click **Upload** to add it to the Attachment list.

8 Click **Save**. The status for the performance review is changed from **Not Started** to **In Progress**.

## Performing a Review

Managers can perform a review.

After a review is started, the status changes to In Progress. When the review has a status of In Progress, you can complete the review.

**You must select a rating for each question and type in a comment for ratings of Exceptional and Occasionally Exceeds. Rating scores will be calculated automatically and displayed as a bar graph with a score.**

**My Team** > **Talent** > **Performance Reviews** > **Current Reviews**

1 In the **Filter By** field, select a filter by which to filter the employee reviews.

2 Click the **Action** icon for the review you want to perform and select **Perform Review**.

3 In the **Contributors Feedback** section, you can review the status of the contributors selected to provide feedback. If a contributor's feedback is completed, you can click the contributor's name to display the feedback.

**Read the Instructions Section by scrolling down within this section.**

4 Click the **View Rating Scale** link for a description of each rating.

5 In the **Rated Questions** section, select a rating for each question and provide comments, as necessary. Click the **View Rating Scale** link for a description of each rating. In the **Non-Rated Questions** section, complete each question.

6 In the **Goals** section, BYPASS FOR NOW

7 The **Overall Performance Rating** is calculated automatically. If necessary, you can add overall comments for the review.

8 In the **Attachments** section, if necessary, click **Add (+)** to upload one or more attachments to the review and do the following:
You can have a maximum of 5 attachments on a performance review. The file size limit is 512 KB.

   a Click **Add Files** and navigate to the directory where the file is located.

   b Select the file and click **Open** to add it to the Files list.

   c Click **Upload** to add it to the Attachment list.

9 Complete any of the following tasks:

- Click **Save** or **Save and Continue Later**.
- Click **Print** to print a blank review or to print a final copy of the review form.

**DO NOT HIT SUBMIT UNTIL YOU VERIFY THAT THE EMPLOYEE HAS COMPLETED THEIR REVIEW.**

- Click **Submit** to submit the review for approval ONLY AFTER VERIFYING THE EMPLOYEE HAS COMPLETED THEIR REVIEW.

## Creating a Personal Goal

**My Team** > **Talent** > **Performance Goals** > **Current Goals**

1 Click **Add (+)** and do one of the following:

- Select **Create a New Goal** and enter the **Goal Name** and select 2015-2016 **Category**.

2 In the **Goal Detail** field, enter any additional information about the goal.

3 Select **Yes** if you want to attach a goal to a performance review, or select **No** if you do not want to attach a goal to the performance review.

4 Enter or select the date on which you assigned the goal to yourself, and also enter or select a target completion date.

5 Click **Done**. Depending on the workflow set up for goals, this goal may need approval before it is displayed in your Goal list.

## Creating and Assigning Personal and Team Goals

**My Team** > **Talent** > **Performance Goals** > **Current Goals**

1 Click **Add (+)** and do one of the following:

- Select **Create a New Goal** and enter the **Goal Name** and **Category (Click 2015 - 2015 Goals - 2016 Goals Review).**

2 In the **Goal Detail** field, enter any additional information about the goal.

3 In the **Goal Level** field, select either team or personal.

4 Select **Yes** if you want to attach a goal to performance reviews, or select No if you do not want to attach a goal to the performance reviews.
This change will be effective from the next review and will be applied to any reviews going forward. However, in-progress reviews will not be affected by this change. Also the default setting for attaching a Personal goal to a performance review is No unless you change the setting to Yes. The default setting for attaching Team Goals to a performance review is Yes, unless you change the setting to No.

5 Enter or select the date you want to assign the goal, and also enter or select the goal target completion date.

6 In the **Team Members** field, select the check box next to the name of each employee to which you want to assign the goal.

7 Click **Done**.

## Editing a Completed Review

**My Team** > **Talent** > **Performance Reviews** > **Historical Reviews**

1 In the **Filter By** field, select a filter by which to filter the employee reviews.

2 After you locate the review that you want, click the **Action** icon and select **Edit Review**.

3 Update information in the fields, as necessary.

4 Click **Save**

## Viewing a Review

**My Team** > **Talent** > **Performance Reviews** > **Current Reviews**

1 In the **Filter By** field, select a filter by which to filter the employee reviews.

2 After you locate the review that you want, click the **Action** icon and select **View Review**.

3 Click **Close**.

## Printing a Completed Review

**My Team** > **Talent** > **Performance Reviews** > **Historical Reviews**

1 In the **Filter By** field, select a filter by which to filter the employee reviews.

2 After you locate the review you want, click the **Action** icon and select **Print Review**.

3 Click **Print.**

## Printing a Blank Review Form

**People** > **Talent** > **Performance Reviews** > **Current Reviews**

1 Select the employee. A list of all reviews that are not completed are displayed for the employee.

2 Click the **Action** icon for the review you want to print and select either **Print Blank Review** or **Print Review**.

3 Depending on your selection, a blank working copy or a filled-in copy of the review form is displayed.

4 At the bottom of the review form, click **Print**.

## Unlocking a Review

After a review is submitted and goes into the approval process, it becomes a locked review. After a review is unlocked by Human Resources, it has a status of In Progress and is available on the Current Reviews page. An unlocked review can also be sent back to the Manager to make changes.

**Person** > **Talent** > **Performance Reviews** > **Historical Reviews**

1 Use the filter tool to locate the employee whose completed review you want to unlock.

2 In the row that contains the review, click the **Action** icon and select **Unlock Review**. The review status is changed to **In Progress** and the review is available for updates.

## Releasing a Review

When the status of the review is **Ready for Release,** the owner of the review has given final approval to the review and the review can be released to the employee. The employee will receive an email message notifying the employee that the review has been released. When the employee acknowledges the review, you will receive an email message notifying you that the review has been acknowledged.

**People** > **Talent** > **Performance Reviews** > **Current Reviews**

1 Select the employee. A list of all reviews that are not completed is displayed for the employee.

2 Click the down arrow in the Sort column to sort the reviews by status.

3 Identify the reviews with a **Ready for Release** status.

4 Click the **Action** icon for the review you want to release and select **Release to Employee** A copy of the review is displayed on the Current Review page in Employee Access for the employee to acknowledge. The status of the review is changed to **Pending Acknowledgement** in Employer Access or to **Complete.**
All completed reviews are moved to the Historical page in Employer Self Service.

## Releasing Reviews to a Group of Employees at the Same Time

**People** > **Talent** > **Performance Reviews** > **Current Reviews**

1. In the Performance Review List, click the up-arrow or down- arrow in the Sort column.
2. Select the check box for each review that is in **Pending Release to Employee** status.
3. Click **Release to Employees**. The employees will receive an email message notifying them that the review has been released.

PRINT FINAL COPY AND BOTH EMPLOYEE AND SUPERVSIOR SIGN AND SUBMIT TO HUMAN RESOURCES

ADP

https://workforcenow.adp.com/portal/admin.jsp#/Setup_ttd_HR%26Talent_PerformanceReviews/SetupTabTalentCategoryPerformanceReviews

Apps Bookmarks ADP

Sections to be included:

- [x] Overall Comments: Comments Require
- [ ] Competencies: Comments Optiona
- [x] Goals: Comments Require

## View/Add Questions

Comments for Questions: Comments Require

To change the question order, select one or more question rows and drag the selection to the appropriate location.

The total weight percentage must equal 100.

ASSIGN RATED QUESTIONS   REMOVE QUESTIONS

RESET WEIGHTING

| RATED QUESTION | WEIGHT % |
|---|---|
| BE RESPECTFUL Be courteous. Do not use profanity. Respect the diversity in all of us. | 8 |
| BE ACCOUNTABLE Protect privacy and confidentiality. Provide clear feedback and accurate information. Be proactive and take initiative. Read, Understand and follow employee handbook. Check and respond to email in a timely manner. Complete work on time. Provide follow-up and explain problem and delays. | 8 |
| BE THOUGHTFUL Be considerate of others personal and work space. Engage in positive behaviors and dispel gossip, rumors, complaining or undermining others. Be attentive to concerns. Work together as an organization. | 7 |
| BE SAFE Keep work area clean. Have accessible and accurate information. Always keep emergency cards up to date. Follow building emergency procedures. | 7 |
| JOB KNOWLEDGE - Possess skills and knowledge to perform the job. Continually looks for ways to improve and promote quality. Applies feedback to improve Performance. Works on projects as part of a team, exchanging ideas and contributing skills that complement those of the other team members. Seeks out ways to better themselves and the company. Is self-motivated. Takes on responsibilities. Looks for ways to improve effectiveness by implementing new ideas and more efficient approaches to job responsibilities. | 35 |
| JOB RESPONSIBILITY AND ACCOUNTABILITY - Quality Completes high quality workaccording to specification. Thoroughly follows standards and procedures. Keeps complete records. Pays attention to details. Has a strong sense of quality and knows how to achieve it. | 35 |
| **Total** | **100** |

ASSIGN NON-RATED QUESTIONS   REMOVE QUESTIONS

2:03 PM 2/1/2016

## *Employee Service Behavior Expectation – Excellence Always!*

### Be Safe
- Keep work area clean.
- Have accessible and accurate information.
- Always keep emergency cards up to date.
- Follow building emergency procedures.
- Keep children safe.

### Be Thoughtful
- Be considerate of others personal and work space.
- Engage in positive behaviors and dispel gossip, rumors, complaining or undermining others.
- Be attentive to concerns.
- Work together as an organization.

### Be Accountable
- Protect privacy and confidentiality.
- Provide clear feedback and accurate information.
- Be proactive and take initiative.
- Read, understand and follow employee handbook.
- Check and respond to email in a timely manner.
- Complete work on time.
- Provide follow-up and explain problem and delays.

### Be Respectful
- Be courteous.
- Do not use profanity.
- Respect the diversity in all of us.
- Be open to feedback from others.