

Performance Reviews



A step-by-step guide on how all Employees and Managers can complete Performance Reviews in UKG

Performance Reviews in UKG

Per the HACAP employee handbook, all new and rehired employees, or currently employed persons transferring into a position requiring a different classification description, must serve the first 180 calendar days of that position on a probationary basis. During this period the employee will have the chance to accustom him or herself to the work; it will also give his or her supervisor an opportunity to see how well the employee is suited for these duties and responsibilities. During the probationary period, the employee will be evaluated by the supervisor at **30**, **90** and **180** days.

All Performance Reviews must be completed in UKG. This is a requirement for all HACAP Managers and Employees. Human Resources will be tracking the status on all reviews and will be following up with reviews that are not being completed.

Attached are instructions on how all HACAP Managers and Employees can complete these reviews. **All steps must be completed in order for the reviews to be completed correctly.**

If you have any questions regarding Performance Reviews in UKG, please reach out to HACAP's Human Resources Department at hresources@hacap.org

MANAGER INSTRUCTIONS:



All of your new hires will be assigned **30**, **90** and **180** day performance reviews in UKG. When a manager has an employee that needs a performance review completed, it will automatically be assigned to your **My To Do Items.**

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Aug 3, 2024
Review
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Please go to your My To Do Items and click on your employees **Review Performance Review** notification. At the bottom right please select **Review** in order to start the Performance Review.

🛞 Kim Kardashian (1483) 🧞 Status: In Progress
Instructions Info Entry Summary
Manager Instructions
Hawkeye Area Community Action Program, Inc.
All new and rehired employees must serve the first 180 calendar days of that position on a probationary basis.
During this period the employee will have the chance to accustom him or herself to the work; it will also give his or her supervisor an opportunity to see how well the employee is suited for these duties and responsibilities.
During the probationary period, the employee will be evaluated by the supervisor at 30 , 90 and 180 days.
 Instructions: To start the evaluation click on the ENTRY tab above. After you have completed all of the sections please hit SAVE and review your entries. Navigate to the SUMMARY section and give your employee a final score. Click SUBMIT once completed.
Ratings:
 Unacceptable - Results do not meet expectations. Developing - Results do not consistently meet expectations. Competent - Results are good. Performance is consistent with expectations. Proficient - Results show a solid understanding of expectations. Outstanding - Results show exceptional performance.

Manager Instructions will be listed on the first page. Once you have read through the instructions, please select **Entry.**

COMPETENCIES	
Company Competencies	
Attendance and Timelines	
Attendance	
HACAP expects all employees to conduct themselves in a professional manner during their employme time.	ent. This includes practicing good attendance habits. All employees should
Please rate the employee based on their attendance. Feel free to include the amount of times	that the employee has been absent or tardy to a shift.
My Review	
Rating *	
* (?)	
Comment	
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The Performance Review will begin with **Attendance and Timelines.** All employees will need to be rated on their current attendance.

Managers must give their employee a rating for each question. Once you have rated your employee, you are also able to add any additional comments to that specific rating if you wish to do so.

Work Performance	
Customer Service	
The employee provides prompt, high-quality service to staff, vendors and internal/external customers. Displays a positive attitude.	
My Review	
Rating*	
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Comment	
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The second part of the Performance Review will cover **HACAP's Company Competencies (Work Performance).** All employees will need to be reviewed on the following competencies:

- Customer Service
- Communication
- Teamwork
- Achievement
- Flexibility/Innovation
- Technical Skills

Managers must give their employee a rating for each competency. Once you have rated your employee on each competency, you are also able to add any additional comments to that specific competency rating if you wish to do so.

Talent > Pe	orformance	
← Perf	formance Review	1) 🖂 View Prior Reviews 💌 Save Submit …
🌒 Kim	Kardashian (1483) 🤰 Status: In Progress	
Instruc	tions Info Entry Summary	
	O WORDS POWERED BY TIMY #	
	GOALS	
	Personal Goals	
	+ Add Goal	
	GENERAL COMMENTS	
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	Kim is a great addition to our team	
	8 WORDS POWERED BY TINY 🦽	

Once you have rated your employee on all six competencies, you are then able to list any **Personal Goals** that you have for your employee, along with any **General Comments.**

Once you are finished in the **Entry** section, please hit **Save.**

Performance			
rformance Review			1) 📖 View Prior Reviews 🔽 Save Submit Sign As Review
m Kardashian (1483) 🧞 Status: Ir	Progress		
uctions Info Entry Summary			
)		
Final Score			
Average Scores			
			Jason Fisher
Overridden Score Jason Fisher			
Ose calculated			
Results Signed by Employee	Signed by Reviewer 1	Signed By Finalizer	
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Final Score*			
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Once you click **Save**, please navigate to the **Summary** section. This section will give you an overview of the whole performance review that you have completed. You are also able to give your employee an **Overridden Score** (final score) or you can just leave it as **Use Calculated.** After you have completed this, you are able to add any additional comments again if you wish to do so.

General > Performance	i) 🖂 View Prior Reviews 👻 Save Submit Sign As Reviewer ····
🖤 Kim Kardashian (1483) 🧞 Status: In Progress	
Instructions Info Entry Summary	
POWERD BY TINY	
Competencies Company Competencies	
✓ Attributes	Jason Fisher
V HACAP Competencies (6)	
Customer Service	Proficient (N/A)
Communication	Proficient (N/A)
Teamwork	Developing (N/A)
Achievement	Competent (N/A)
Flexibility/Innovation	Proficient (N/A)
Technical Skills	Outstanding (N/A)
Average	
General Comments	
Jason Fisher 09/09/2024	
Kim is a great addition to our team!	

Final Step: Once you have reviewed the full performance review and you are ready to submit it, click on the **Submit** button at the top right.

Do not click on Sign as Reviewer yet.

EMPLOYEE INSTRUCTIONS:



Once a manager successfully submits their first part of the employees performance review, it's now the employee's turn to complete their part. When an employee needs to review their performance review, it will automatically be assigned to their **My To Do Items.**

Review Perfo	ormance Review shian (1483)				
					X View Workflow
Created	09/10/2024 02:04 pm	Employee Name	Kim Kardashian	Scheduled Date	Oct 2, 2024
Name	Kim Kardashian: First 90 Day Probationary Review (2024/10/02)				
					Review

Please go to your My To Do Items and click on the **Review**

Performance Review notification. At the bottom right please select **Review.**

nstructions Entry Summary	
Employee Instructions	
nawkeye Area community Action Program, inc.	
All new and rehired employees must serve the first 180 calendar days of that position on a probationary basis.	
During this period the employee will have the chance to accustom him or herself to the work;	
it will also give his or her supervisor an opportunity to see how well the employee is suited for these duties and responsibilities.	
During the probationary period, the employee will be evaluated by the supervisor at 30, 90 and 180 days.	
Instructions:	
To start the evaluation click on the ENTRY tab above.	
After you have completed all of the sections please hit SAVE and then SUBMIT.	
Ratings:	
Unacceptable - Results do not meet expectations.	
Developing - Results do not consistently meet expectations. Compating - Results are good. Performance is consistent with expectations	
Proficient - Results show a solid understanding of expectations.	
Outstanding - Results show exceptional performance.	
	1

Employee
Instructions will be
listed on the first page.
Once you have read
through the
instructions, please
select Entry.

Attendance and Timelines				
Attendance				
HACAP expects all employees to conduct themselves in a professional manner during their employment. This includes practicing g Please rate the employee based on their attendance. Feel free to include the amount of times that the employee has bee				
Jason's Review				
Jason Fisher 09/27/2024 Competent ✓				
(no comment) My Review				
Rating* ⑦				
Comment				
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The Performance Review will begin with Attendance and Timelines.

All employees will need to rate themselves based on their current attendance. Once you have rated yourself, you are also able to add any additional comments to that specific rating if you wish to do so.

Customer Service					
The employee provides prompt, high-quality service to staff, vendors and internal/external customers. Displays a positive a					
Jason's Review					
Jason Fisher 09/27/2024 Competent ✓					
(no comment) My Review					
Rating*					
Comment					
B I 및 S I = Ξ Ξ ■ Default (Noto ∨ 14pt ∨					
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The second part of the Performance Review will cover **HACAP's Company Competencies (Work Performance).** All employees must rate themselves on the following competencies:

- Customer Service
- Communication
- Teamwork
- Achievement
- Flexibility/Innovation
- Technical Skills

Please take the time to consider your strengths and areas of improvement while completing your review. You can also add comments to each of your ratings if you wish to do so.

Once you have rated yourself on all six competencies, you are then able to list any **Personal Goals** that you have for yourself, along with any **General Comments.**

Final Step: Once you are finished with your self-evaluation, please hit **Save** and then **Submit.**

MANAGER INSTRUCTIONS:



Once an employee successfully submits their first part of their performance review, it's now the managers turn to sign the performance review. When a performance review is ready for the managers signature, it will automatically be assigned to their **My To Do Items.**

ager Sign Performance Rev (im Kardashian (1483) 🤹	iew				
					🛱 View Performance Review 🛛 🗙 View Workflo
upervisor	Jason Fisher	Manager	Jason Fisher	Location	Johnson/Waterfront Head S
reated	09/10/2024 02:39 pm	Employee Name	Kim Kardashian	Scheduled Date	Oct 2, 2
ame Kim Kardashian: First	90 Day Probationary Review (2024/10/02)				
					Sign

Please go to your My To Do Items and click on the **Manager Sign Performance Review** notification. At the bottom right please select **Sign.**

It > Performance			
Performance Review			1) 📖 View Prior Reviews 🕤 Save Sign As Manager
Kim Kardashian (1483) Status: In Progress			
nstructions Info Entry Summary			
Final Score			
Average Scores			
		Jason Fisher	Kim Kardashian
Average of all Attribute groups			
Overridden Score	Kim Kardashian		
Use Calculated -	Use Calculated -		
Results			
Signed by Employee	Signed by Reviewer 1	Signed By Finalizer	
Comment			
comment			
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Once you select **Sign,** the system will take you back into the **Summary** tab. Here you are able to review again how you rated the employee, and you will also be able to see how the employee rated themselves, along with any comments that the employee may have left.

Final Step: Once you have reviewed the completed performance review, please select **Sign As Manager** at the top right.

EMPLOYEE INSTRUCTIONS:

My To Do Items 2	My Notifications 10 My Ch					
← My To Do Items						
Page 1 of 1 > 1 - 2 of 2 Rows						
Select all (0/0) Saved: [System] -						
Employee Sign Performance Re Kim Kardashian Kim Kardashian: First 90 Day Probationary Created 09/10/2024 02:55 pm						

Once a manager successfully signs the employees performance review, it's now the employees turn to sign their performance review. When a performance review is ready for the employees signature, it will automatically be assigned to their **My To Do Items.**

Employee Sig	gn Performance Review shian (1483)				
					X View Workflow
Created	09/10/2024 02:55 pm	Employee Name	Kim Kardashian	Scheduled Date	Oct 2, 2024
Name	Kim Kardashian: First 90 Day Probationary Review (2024/10/02)				
					Reject to Sign Sign

Please go to your My To Do Items and click on the **Employee Sign Performance Review** notification.

All employees have the option to either **Sign** or **Reject to Sign** their performance reviews.

You must select either Sign or Reject to Sign in order to fully complete the performance review.

iy career > Performance			
← My Performance Review			👔 📖 View Job Description Save Sign As Employee Download
Kim Kardashian (1483) Status: In Progress			
Instructions Info Entry Summary			
Final Score			
Average Scores			
		Jason Fisher	Kim Kardashian
Average of all Attribute groups			
Overridden Score			
Jason Fisher	Kim Kardashian		
Results			
Signed by Employee	Signed by Reviewer 1	Signed By Jason Fisher	
mm/dd/yyyy	mm/dd/yyyy	09/10/2024	
Signed By Finalizer			
mm/dd/yyyy			
Comment			
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Once you select **Sign,** the system will take you back into the **Summary** tab. Here you are able to review again how you rated yourself, and you will also be able to see how your manager rated you, along with any comments that your manager may have left.

You also have the option to **Download** a copy of your performance review if you'd like. Once you're all finished up, please select **Sign As Employee** at the top right.

Collect Note Performance Review Request (1483)					
					X View Workflow
Created	09/10/2024 03:09 pm	Employee Name	Kim Kardashian	Scheduled Date	Oct 2, 2024
Name Kim Kardashian: First 90 Day Probationary	Review (2024/10/02)				
Comment					
					Skip Add Note

Final Step: Once you sign your performance review, a **Collect Note** option will appear. If you would like to provide feedback regarding your performance evaluation to your manager, you can do that here.

You must select either Skip or Add Note to fully complete the performance review.

Additional Information:



If you would ever like to re-visit any of your performance reviews, you are able to do this at any time.

Go to the top left menu icon and select:

My Info > My Career > Performance > Performance Reviews.

NOTE: Your performance review **MUST** be finalized by HR first before you are able to view it. You can view your past performance reviews at anytime, however once it's submitted you are unable to make any changes to it.

FINALIZE PERFORMANCE REVIEW:



Once a manager **AND** an employee successfully submits both of their parts on the performance review, it's now HR's turn to finalize the performance review. When HR needs to finalize a performance review, it will automatically be assigned to their **My To Do Items.**

Final Step: Once HR has signed off on the performance review, no further action is required. The performance review is officially completed.

If you ever have any questions regarding Performance Reviews in UKG, please reach out to Human Resources at any time.