

Performance Reviews



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

Performance Reviews in UKG

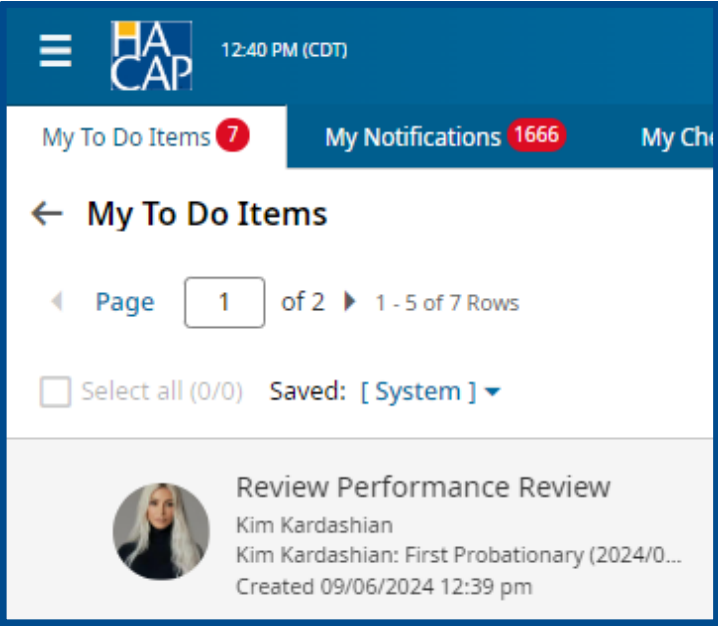
Per the HACAP employee handbook, all new and rehired employees, or currently employed persons transferring into a position requiring a different classification description, must serve the first 180 calendar days of that position on a probationary basis. During this period the employee will have the chance 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.

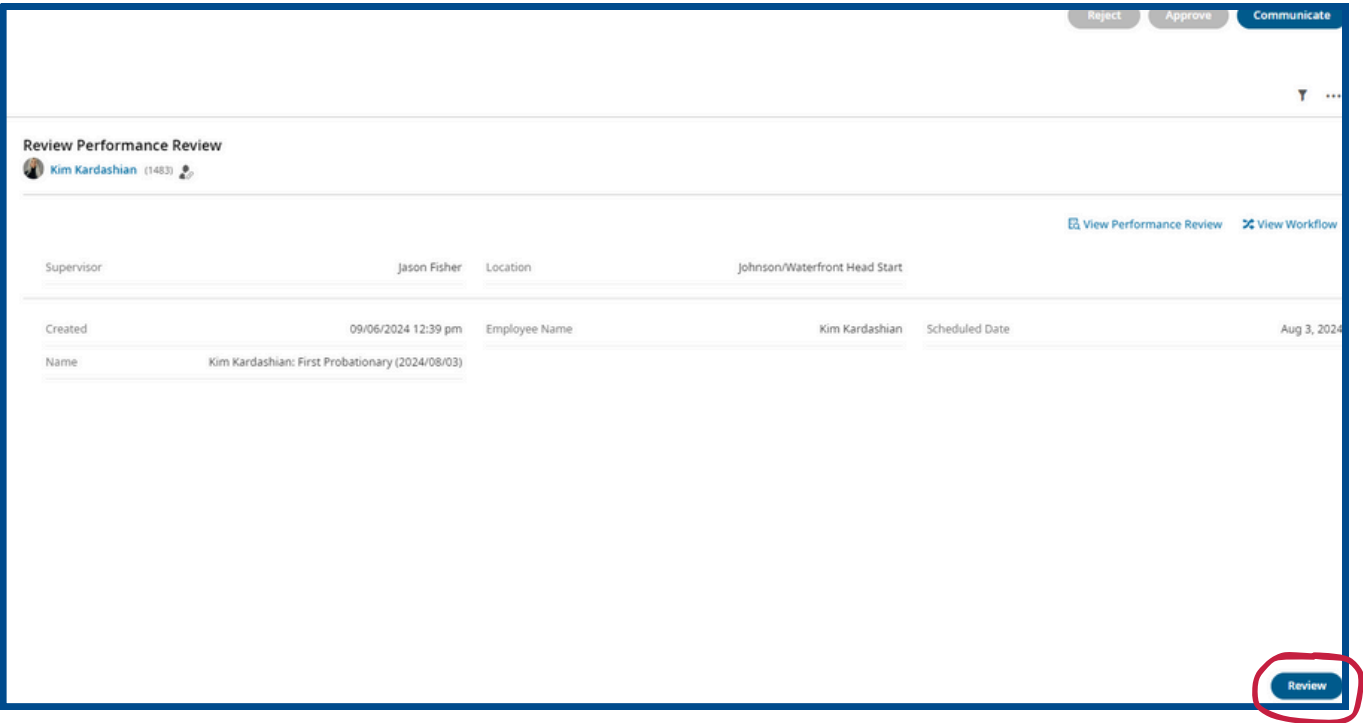
Attached are instructions on how all HACAP Managers and Employees can complete these reviews. **All steps must be completed in order for the reviews to be completed correctly.**

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**.



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 employment. This includes practicing good attendance habits. All employees should be on time.

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

B I U L T | Default (Noto... 14pt

© WORDS POWERED BY TINY

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.

The screenshot shows a web-based form titled "Work Performance" for the competency "Customer Service". The description states: "The employee provides prompt, high-quality service to staff, vendors and internal/external customers. Displays a positive attitude." Under the "My Review" section, there is a "Rating *" dropdown menu currently set to "...", accompanied by a help icon. Below this is a "Comment" section featuring a rich text editor with a toolbar containing various formatting options (bold, italic, underline, link, etc.) and a text area. The bottom right of the text area shows "0 WORDS POWERED BY TINY".

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.

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**.

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.

Performance Review

Kim Kardashian (1483) Status: In Progress

Instructions Info Entry Summary

COMPETENCIES

Company Competencies

Attributes	Jason Fisher
HACAP Competencies (5)	
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

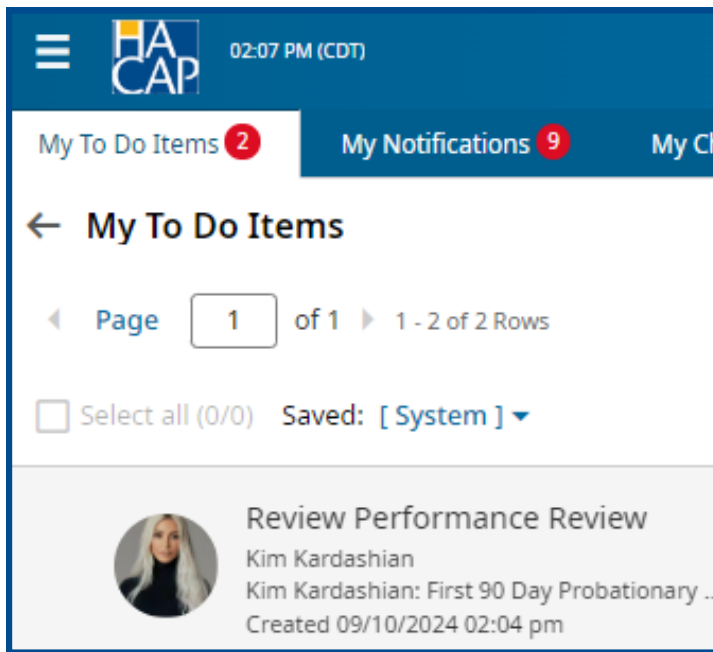
Jason Fisher
09/09/2024

Kim is a great addition to our team!

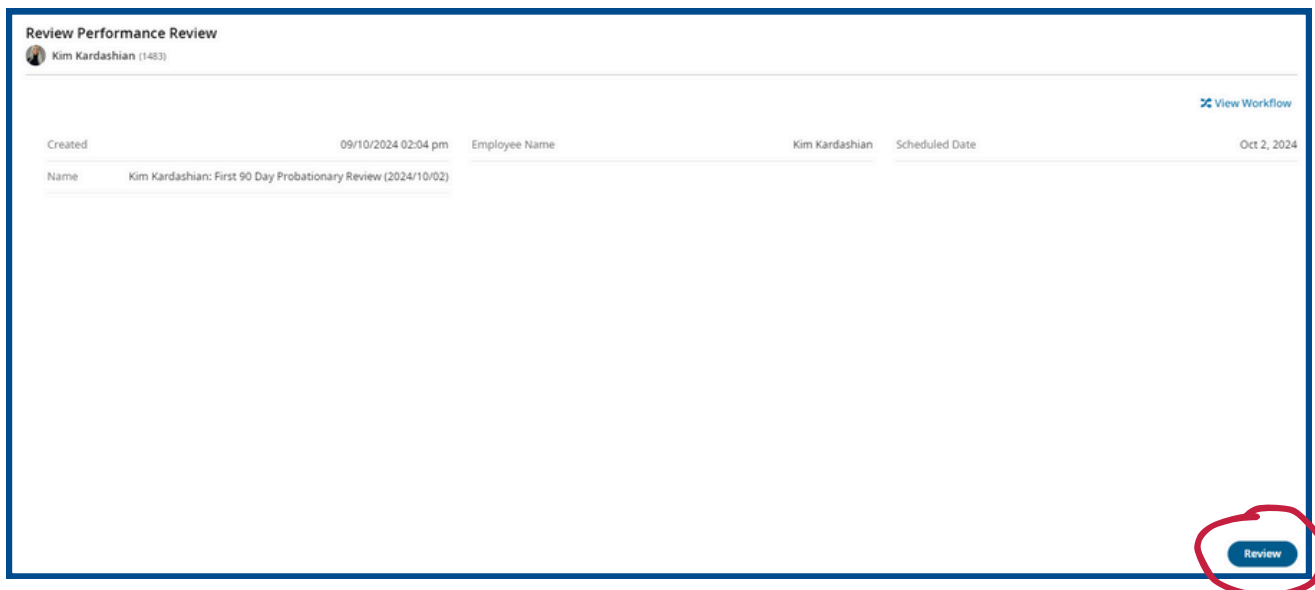
Final Step: Once you have reviewed the full performance review and you are ready to submit it, click on the **Submit** button at the top right.

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**.



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

Kim Kardashian (1483) | Status: In Progress

Instructions Entry Summary

Employee 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 then **SUBMIT**.

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.

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 good attendance. Please rate the employee based on their attendance. Feel free to include the amount of times that the employee has been absent.

Jason's Review

Jason Fisher
09/27/2024

Competent ✓

(no comment)

My Review

Rating *

Comment

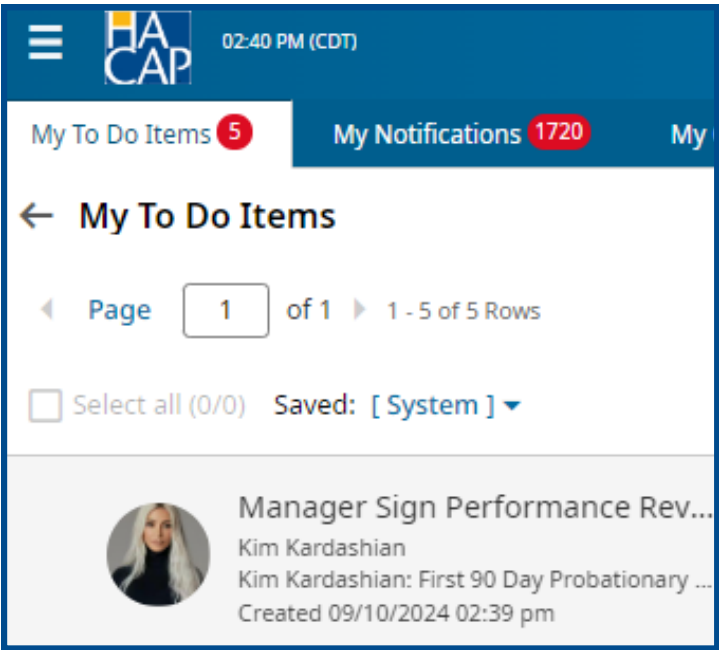
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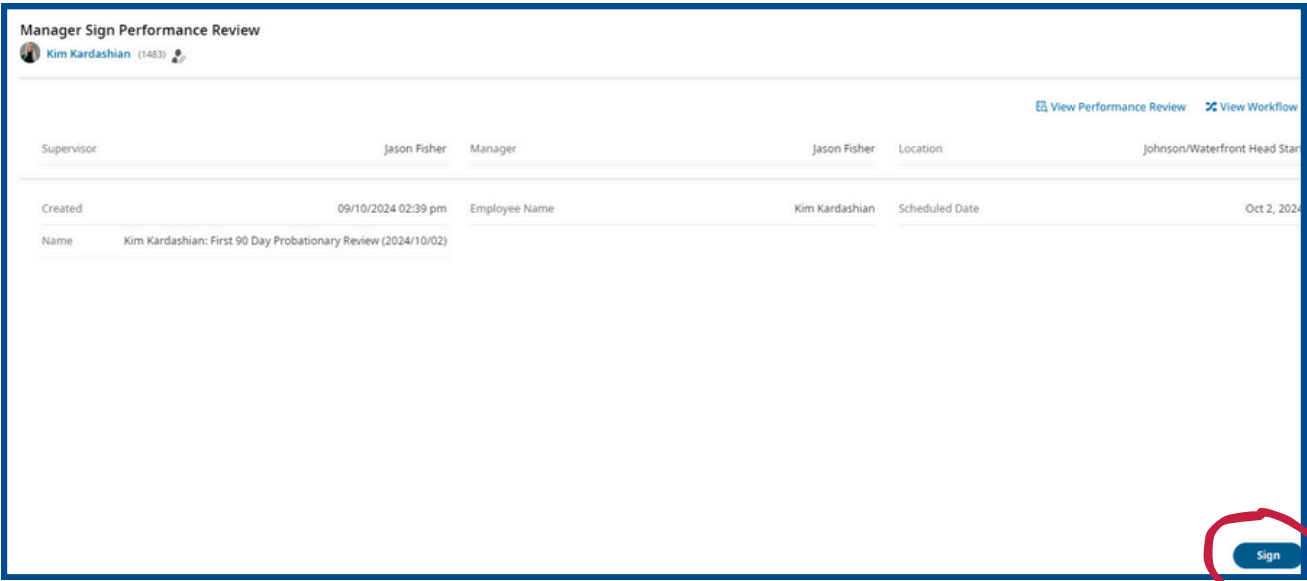
The Performance Review will begin with **Attendance and Timelines**.

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.

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**.



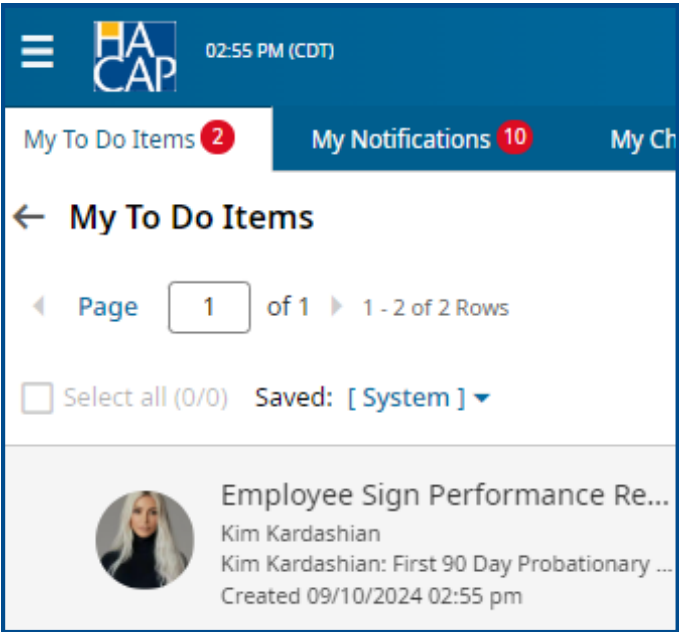
Please go to your My To Do Items and click on the **Manager Sign Performance Review** notification. At the bottom right please select **Sign**.

The screenshot shows a web application interface for a performance review. At the top, there's a header bar with a back arrow, the title "Performance Review", and three buttons: "View Prior Reviews", "Save", and "Sign As Manager". The "Sign As Manager" button is circled in red. Below the header, the user's name "Kim Kardashian (1483)" and the status "Status: In Progress" are displayed. A navigation bar shows tabs for "Instructions", "Info", "Entry", and "Summary", with "Summary" being the active tab. The main content area is titled "Final Score" and contains several sections: "Average Scores" with a table showing scores for "Jason Fisher" and "Kim Kardashian" based on the "Average of all Attribute groups"; "Overridden Score" with dropdown menus for "Jason Fisher" and "Kim Kardashian", both set to "Use Calculated"; and "Results" with fields for "Signed by Employee", "Signed by Reviewer 1", and "Signed by Finalizer", all containing placeholder text "mm/dd/yyyy". A "Comment" section with a rich text editor is at the bottom.

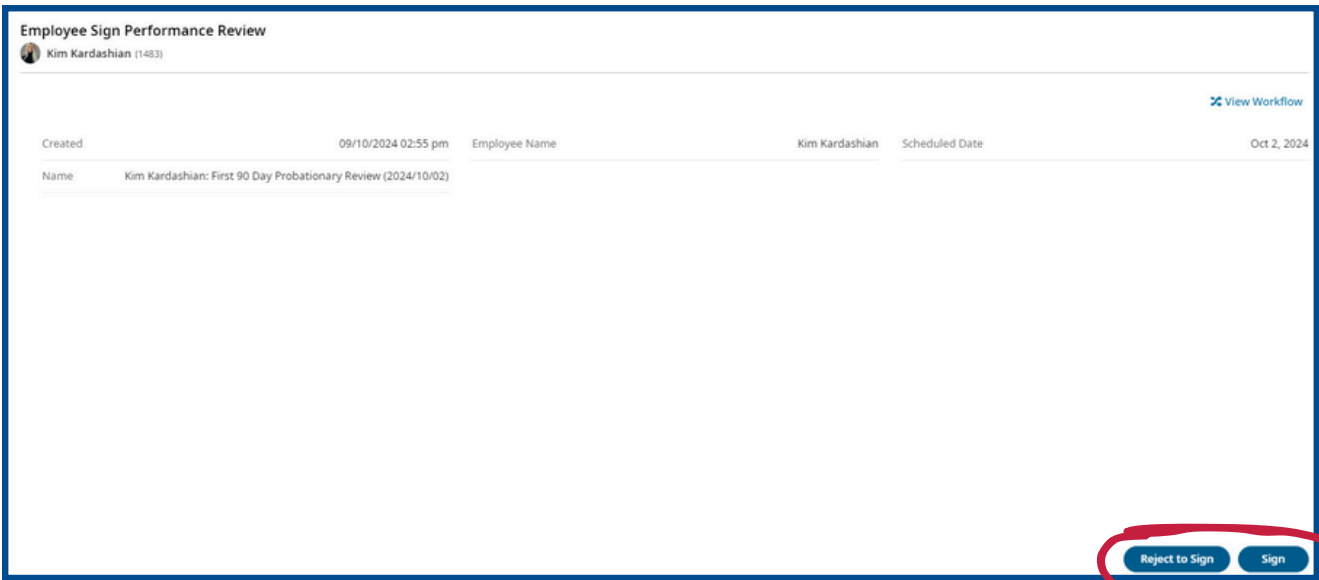
Once you select **Sign**, the system will take you back into the **Summary** tab. Here you are able to review again how you rated the employee, and you will also be able to see how the employee rated themselves, along with any comments that the employee may have left.

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

EMPLOYEE INSTRUCTIONS:



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**.



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.



Sign As Employee

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.

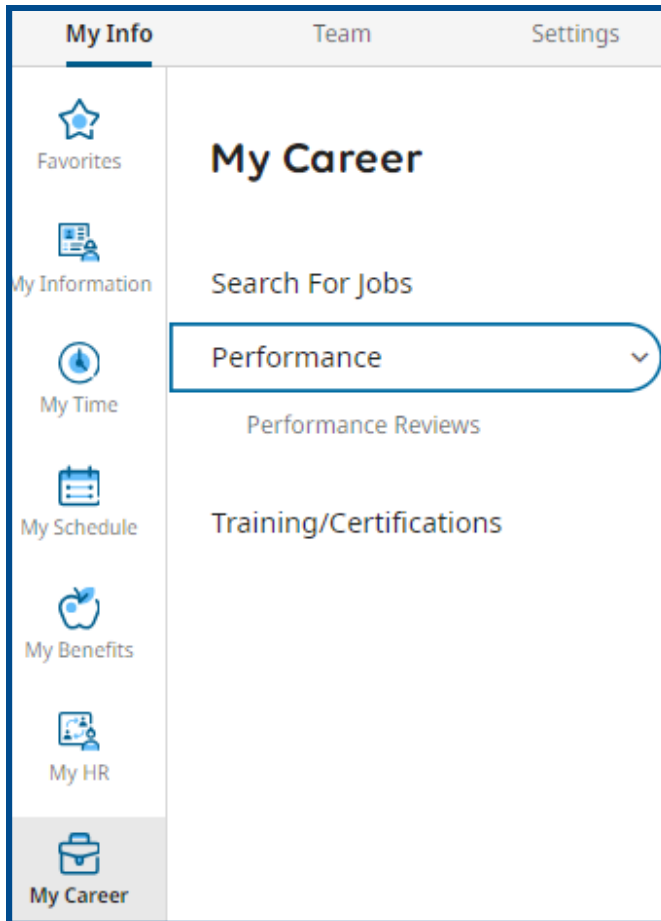
You also have the option to **Download** a copy of your performance review if you'd like. Once you're all finished up, please select **Sign As Employee** at the top right.

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:



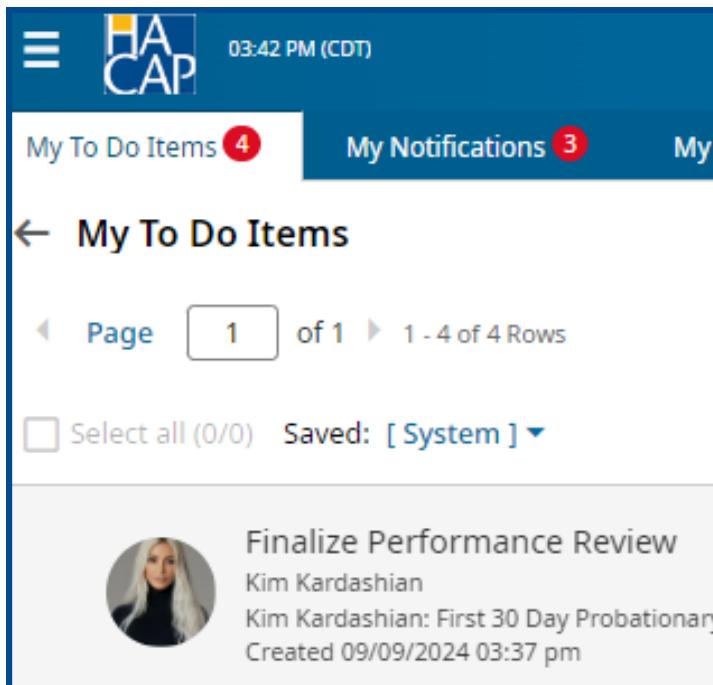
If you would ever like to re-visit any of your performance reviews, you are able to do this at any time.

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.