

Evaluators have access to the Standard Performance Review Step Status Report in MyPURPOSE. This report will help evaluators locate where a performance review is located in workflow, as well to quickly see if their employee performance reviews are complete. Please see the report instructions below.

• From the MyPURPOSE Home screen, hover over the Reports tab and select Standard Reports.

| MyPURPOSE | | | Grow. | Learn. | Lead. | Serve. | |
|-----------|------------------|---------|---------|----------|-------------|--------------------|------------------|
| Home | Need Assistance? | Profile | Connect | Learning | Performance | Open Opportunities | Reports |
| | Welcor | ne | | | | | Standard Reports |

• Select the Performance tab on the Reports screen, then select the Performance Review Step Status Report.

| Home | Need A | Assistance? | Profile | Connect | Learning | Performanc |
|---------------|----------------|--------------------------------------|-----------------|---------------|------------------|---------------------|
| Reports | | | | | | |
| Click on a re | port catego | ory to view thos | e reports. You | may search fo | r any reports by | title or descriptic |
| | | | | | | |
| Track Emp | p loyees | Training | Perform | nance | | |
| | | | | | | |
| | | w Step Status I eps in a Performa | | <u> </u> | | |
| view the sta | tus of all ste | ips in a Performa | nce Review task | / | | |

- Enter Report Criteria:
 - Using the drop down option, select the User Criteria of Organization. You will be restricted to your organization and your direct reports.
 - Select the options icon next to Performance Review Task.

| Reports > | |
|--|--|
| Performance Review Step St | atus Report |
| Report Criteria | |
| View the status of all steps in a Performan | ce Review task. |
| USER CRITERIA | |
| User Criteria: | The availability criteria that you select will only include employees who meet the following criteria: Organization |
| ADVANCED FILTERS | |
| Performance Review Task: Review Steps: Display OU: | Review steps will appear when a task is selected |

• From the Search Tasks screen, select the Performance Review you want to report on.

| Search Tasks | | |
|----------------|----------|----------------------------|
| Search Tasks : | | |
| Title: | 🔍 Search | |
| | | « Previous 1-1 of 1 ▼ Next |
| Tasks | | « Previous 1-1 of 1 ▼ Next |

• All Review Steps should be checked by default, select Export to Excel.

| Home | Need Assistance? P | rofile | Connect | Learning | Performance | Open Opportunities | Report | | |
|----------|----------------------------------|-----------|---|-------------------|-------------|-----------------------------|---------------|--|--|
| oorts > | | | | | | | | | |
| orform | ance Review Step | Statua | Poport | | | | | | |
| enonn | ance Keview Step | วเลเนร | Report | | | | | | |
| | | | | | | | | | |
| Report C | riteria | | | | | | | | |
| View the | status of all steps in a Perform | ance Revi | ew task. | | | | | | |
| | • | | | | | | | | |
| USER C | RITERIA | | | | | | | | |
| | | | | | | | | | |
| | User Criteria | | | ria that you sele | | mployees who meet the follo | owing criteri | | |
| | | Orga | nization | | لع 🔻 | | | | |
| | | | | | | | | | |
| ADVAN | CED FILTERS | | | | | | | | |
| | | | | | | | | | |
| | Performance Review Tas | | Performance | | × | | | | |
| | | - | valuator Revi | iew | | | | | |
| | | | Self Review | | | | | | |
| | Review Step | 5. | Evaluator Goal Review Confirmation | | | | | | |
| | | | Next Line Supervisor Review Evaluator Discussion and Acknowledgment | | | | | | |
| | | | | | nowledgment | | | | |
| | | | | nowledgment | | | | | |
| | Display Ol | J: None | • | | | | | | |
| OUTP | UT | _ | | | | | | | |
| | | | | | | | | | |

• You will be prompted to Open or Save the Excel document, either option is fine. When the report displays, you will see a list of users (employees) who report to you.

At a quick glance, you can see if a performance review task is fully completed by reviewing the Task Status Column. You will also see a column for each step in workflow, if the Task Status column does not indicate that the task is complete, all other columns will show not started, in-progress, completed or past due.

| Performance | Review S | tep Statu | s Report | | | | | | |
|----------------------|-----------------------------|---------------|-----------------------------|-------------|------------------|-------------|------------------------------------|-----------------------------|---|
| User | User ID | Manager | Title | Task Status | Evaluator Review | Self Review | Evaluator Goal Review Confirmation | Next Line Supervisor Review | Evaluator Discussion and Acknowledgment |
| Smith, Mary | XXX1234 | Jones, Salley | Annual Performance Planning | Complete | Complete | Complete | Complete | Complete | Complete |
| Wright, Pixie | ABC0111 | Jones, Salley | Annual Performance Planning | Complete | Complete | Complete | Complete | Complete | Complete |
| Moore, Tina | DEF4567 | Jones, Salley | Annual Performance Planning | Complete | Complete | Complete | Complete | Complete | Complete |
| Jones, Salley | GHI8910 | Johnson, Sue | Annual Performance Planning | Complete | Complete | Complete | Complete | Complete | Complete |
| Jackson, Joe | JKL2345 | Jones, Salley | Annual Performance Planning | Complete | Complete | Complete | Complete | Complete | Complete |
| Taylor, Steve | MNO9874 | Jones, Salley | Annual Performance Planning | Complete | Complete | Complete | Complete | Complete | Complete |
| Cox, Jessie | PQR0000 | Jones, Salley | Annual Performance Planning | Complete | Complete | Complete | Complete | Complete | Complete |
| Report Criteria | | | | | | | | | |
| Task: | Annual Performance Planning | | | | | | | | |
| Report Generated By: | Jones, Salley | | | | | | | | |
| Report Date: | 3/18/2020 | | | | | | | | |