Tracking progress on and completion of performance reviews in Workday can be challenging without the use of reports to pull together key indicators of review task status, especially for those with large teams. A report called *Performance Review Tracking – Med Centers R0407* has been created to provide managers and performance review alternates a critical tool to help manage the review process for their team(s).

1. In the search bar in the upper left hand corner of Workday, enter ‘*Performance Review Tracking – Med Centers R0407*’ and click on the report name from the search results.

2. In the report parameters screen, enter the following:
   a. *Organizations* – Enter the **name of the supervisory organization’s manager**. Select the correct supervisory organization from the resulting list.
   b. *Include Subordinate Organizations* – To view the manager’s direct and indirect reports, check this box. To view only the direct reports, uncheck.
   c. *Review Period* – Enter **2017**.
   d. Click **OK**.
3. The report output will display in a table similar to the example below. Click the excel icon to download or the printer icon to print.

How to interpret the data above:

- Employee 1’s performance review was canceled (col F & J). This is due to the worker having an approved leave of absence for more than 60 days during the review window.
- Employee 2 is in a job profile that did not require the peer reviews (col F) or the self evaluation (col J), and the manager evaluation is available in the manager’s inbox (col K).
- Employee 3 completed the self eval task (col J) and the get additional reviewer task (col F). The manager approved the list of peer reviewers (col G), and one of three peer reviewers completed the peer review (col H and I). The manager evaluation is also available in the manager’s inbox (col K).
- Employee 4 completed the self eval task (col J) and the get additional reviewer task (col F). The manager has not yet approved the list of peer reviewers (col G) but started the manager evaluation (col K and L).
- Employee 5 is in a job profile that did not require the peer reviews (col F) or the self evaluation (col J); the manager evaluation is complete (col K & L), and the employee acknowledged the review is complete (col M).
- Employee 6 completed the self eval task (col J) and the get additional reviewer task (col F). The manager approved the list of peer reviewers (col G), and two of two peers submitted reviews (col H and I). The manager evaluation is complete (col K & L), and both employee and manager acknowledged the review is complete (col M and N).
<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>DESCRIPTION AND STATUS INDICATORS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A. Review Period</strong></td>
<td>Date range for which performance is being evaluated</td>
</tr>
<tr>
<td><strong>B. Worker</strong></td>
<td>Name of the worker being evaluated</td>
</tr>
<tr>
<td><strong>C. Supervisory Organization</strong></td>
<td>Supervisory organization of the worker’s primary position</td>
</tr>
<tr>
<td><strong>D. Manager</strong></td>
<td>Manager of the supervisory organization from column C</td>
</tr>
<tr>
<td><strong>E. Performance Review</strong></td>
<td>Indicates the template that was launched for the worker. Non-Supervisors evaluated on 4 pillars; Supervisors on 5 pillars</td>
</tr>
</tbody>
</table>
| **F. Get Additional Reviewers: Employee Step Status** | i. *Awaiting Action* – Employee has not yet begun the task to identify peer reviewers  
ii. *Saved for Later* – Employee opened task and clicked saved for later  
iii. *Submitted* – Employee completed and submitted the list of proposed peer reviewers  
iv. *Manually Advanced* – Step was manually skipped by manager (or Workday administrator on manager’s behalf)  
v. *Not Required* – Step was auto skipped based on employee’s job profile  
vi. *Canceled* – Performance review was canceled, most likely due to approved Leave of Absence greater than 60 days or worker’s separation since launch of performance reviews |
| **G. Get Additional Reviewers: Manager Step Status** | i. *In Progress* – Review peer reviewer list task is in manager’s inbox awaiting approval  
ii. *Successfully Completed* – Manager has approved and submitted final list of additional reviewers; peer reviews have been launched  
iii. *Canceled* – Performance review was canceled, most likely due to approved Leave of Absence greater than 60 days or separation since launch |
| **H. Additional Reviewer** | Name of the approved peer reviewer(s) |
| **I. Evaluation Status** | Status of the peer reviewer task for the peer indicated in the row  
i. *In Progress* – Peer review task in peer’s inbox awaiting completion  
ii. *Successfully Completed* – Peer completed and submitted the peer review |
| **J. Self Evaluation Status** | i. *Awaiting Action* – Employee has not yet begun the task to complete the self evaluation  
ii. *Saved for Later* – Employee opened task and clicked saved for later  
iii. *Submitted* – Employee completed and submitted the self evaluation  
iv. *Manually Advanced* – Step was manually skipped by manager (or Workday administrator on manager’s behalf)  
v. *Not Required* – Step was auto skipped based on employee’s job profile  
vi. *Canceled* – Performance review was canceled, most likely due to approved Leave of Absence greater than 60 days or worker’s separation since launch of performance reviews |
| **K. Manager Evaluation Status** | Manager evaluations must be completed and submitted in Workday, followed by an in person meeting with the employee to review the content of the evaluation, and once the manager is confident no edits are needed to the content, the evaluation is approved in Workday  
i. *In Progress* – Manager evaluation task is not yet approved. Evaluation may be in one of many states, including not yet started, started but saved for later, or submitted and pending in person meeting/final approval  
ii. *Successfully Completed* – Manager evaluation has been fully approved; this status should indicate the evaluation has been shared with the employee and no additional edits to the self evaluation and/or manager evaluation are needed  
iii. *Canceled* – Performance review was canceled, most likely due to approved Leave of Absence greater than 60 days or separation since launch |
| **L. Manager Evaluation Rating** | Overall evaluation score based on average of Pillar Goal ratings; ranges from 1 to 3. If manager evaluation is not yet ‘successfully completed’, this score will display based on entries to the evaluation at the time the report was run. This overall rating should only be considered final once the manager evaluation step is successfully completed. |
| **M. Acknowledgement – Employee** | i. *Successfully Completed* – Employee has acknowledged the evaluation is complete, either with or without comments |
| **N. Acknowledgement – Manager** | i. *Successfully Completed* - Manager has acknowledged the evaluation is complete, either with or without comments. Review is complete! |