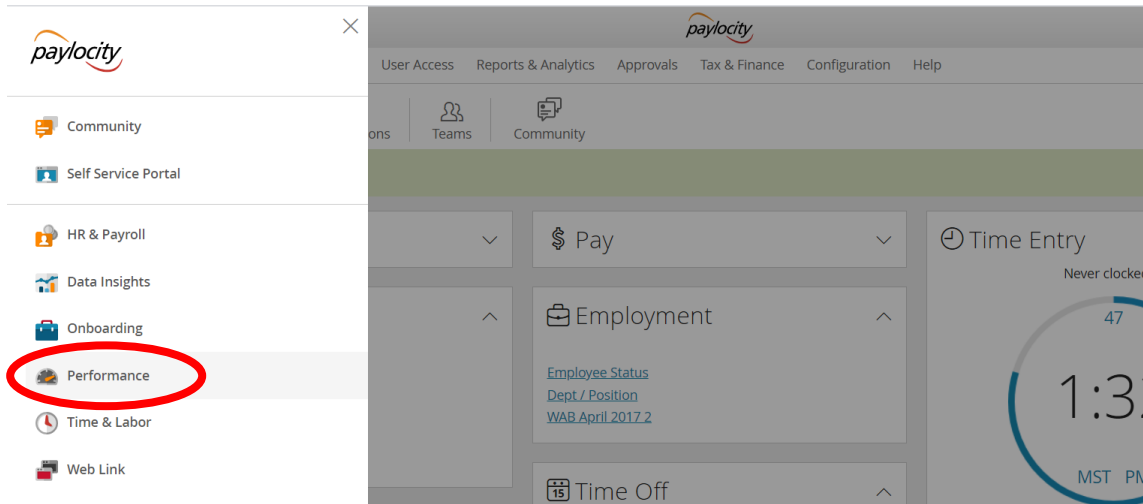# ASSIGNING AND TRACKING THE WAB IN PAYLOCITY

I.   ASSIGNING THE WAB

1. From Paylocity landing page, select Performance

2. Select Assign Review

3. Complete Review Form

< Assign Review   Next

0% Complete

- **Form and Date Selection**
  In Progress
- Employee Selection
  Incomplete
- Notification
  Incomplete
- Preview and Assign
  Incomplete

Select Form

Choose the review form you would like to assign.

Select Form (required)

Start Typing   ⌄

Cycle Name (required) ⓘ

Set Available Date

Set the date the review form is available.

◉ Immediately Available

Set Due Date

Set the date the review form is due.

Review Due Date (required)

[   ] ⊞

Min: 01/27/2020

4. Select <u>Form type and Dates</u>

< Assign Review   Next

25% Complete

- ✓ **Form and Date Selection**
  Completed
- Employee Selection
  Incomplete
- Notification
  Incomplete
- Preview and Assign
  Incomplete

Select Form

Choose the review form you would like to assign.

Select Form (required)

WAB 2020   ⌄

Cycle Name (required) ⓘ

WAB 2020

Set Available Date

Set the date the review form is available.

◉ Immediately Available

Set Due Date

Set the date the review form is due.

Review Due Date (required)

02/05/2020   ⊞

Min: 01/27/2020

Goal Selection

Pre-select the goals to include in the review based on goal start date.

Enable/Disable

[⬛]

Restrict adding and selecting goals within the review to Reviewers Only

| No | **Yes** |

                                                             Next

5. Select Employee(s)

6. Notify Employee – Sends a notice via email

7. **Review and Assign**

8. **Select Review Status Tab to be sure the WAB is Live**

9. If Goals don't populate in the WAB, Select <u>Add Existing Goals</u>

10. <u>Select the Goals you wish to add; then SAVE</u>

II.   TRACKING THE WALK AROUND THE BLOCK

While in the Review Status tab, you will note that you can see the status of each WAB for each employee

Assess what stage each review is in by checking the Status column

1. **Assigned:** The review has been assigned to the employee
2. **Employee Self Appraisal Pending:** The review is in the employee's queue, because the employee has not completed it in some way. The employee must ensure that they have completed all of the items below in order for their supervisor to see their review.
   - Employee should select a rating as "none" for each of the categories.
   - Employee should enter comments in each of the categories.
   - Employee should select SUBMIT on the Summary page.
3. **Employee Self Appraisal Complete:** The employee has completed their part of the appraisal and the manager now has access to be able to complete the manager portion.
4. **Employee Signature Pending:** The manager (reviewer) has completed their portion and it is now in the Employee's queue for final comments and signature.
5. **Reviewer Signature Pending:** The employee has signed the review and submitted it back to the manager for the manager (reviewer's) signature. The system does not prompt the manager to go back and sign the review, but the manager can check the review status and see which reviews still need to be signed.
6. **Complete:** All parts of the review are completed.