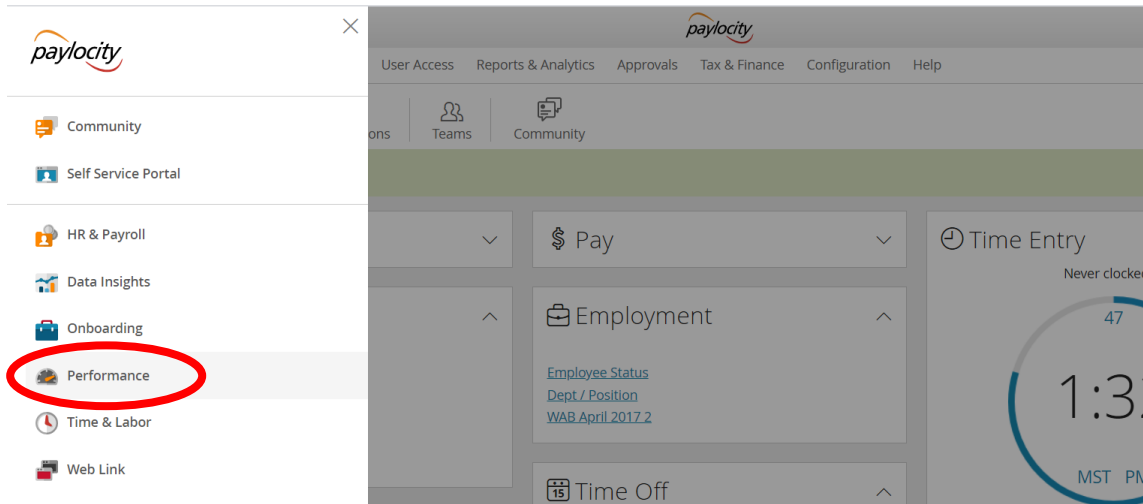


ASSIGNING AND TRACKING THE WAB IN PAYLOCITY

I. ASSIGNING THE WAB

1. From Paylocity landing page, select Performance



2. Select Assign Review

The screenshot displays the 'My Team' review page. At the top, there are tabs for Review Status, My Team (selected), Journals, Goal Status, and Feedback Status. Below the tabs is a search bar with a filter dropdown set to 'Last, First', a search button, and a reset button. Active filters include 'Employee Status: Active' and 'Supervised Employees: Direct Reports'. A 'Show Compensation' toggle is currently off. A 'Compensation' box indicates that compensation is not being shown. A 'Team Activity, Last 90 Days' summary shows 0 Journal Entries, 0 Feedback Received, 0 Impressions Awarded, and 6 Goals Added (100% of team). A row of action buttons includes 'Create Journal', 'Create Goal', 'Request Feedback', 'Assign Review' (circled in red), and 'Reassign Previous Review'. Below this is a table with columns for Employee, Rating, Tenure, Journals, Feedback, Impressions, Active Goals, and Completed Goals. The first row shows employee Loretta McDaniel (HUMAN RESOURCES GENERALIST) with a rating of 0.0 / 1.0, a tenure of 3.8, 0 Journals, 0 Feedback, 0 Impressions, 9 Active Goals, and 4 Completed Goals.

Employee	Rating	Tenure	Journals	Feedback	Impressions	Active Goals	Completed Goals
Loretta McDaniel HUMAN RESOURCES GENERALIST	0.0 / 1.0	3.8	0	0	0	9	4

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 Form type and Dates

< 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

 Next

5. Select Employee(s)

< Assign Review Previous Next

75% Complete

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

Employee Selection

Select the employees you would like to be reviewed.

Search Employee First, Last Name Filter Employees

Active Filters: Employee Status: Active Clear All

Available Employees (150) Add All Selected Employees (1) Remove All

RA Roberto Aguirre

CA Candace Alexander

MA Marion Aranda

TA Toni Arellano

SB Sherri Baca

LM Loretta McDaniel
Human Resources Generalist

Previous Next

6. Notify Employee – Sends a notice via email

I Library District [38050] *paylocity*

My Performance Performance Tasks Management Tasks Succession Reports & Analytics Configuration Help

< Assign Review Previous Next

75% Complete

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

Participant Notification

Configure the message that will be sent alerting the Employee or Reviewer when the review is available.


Subject (required)
Performance Review Assigned

Automatically pre-pend the subject line with "Input required by 01/30/2020 for WAB 2020 -"

Body (required)
A performance review has been assigned to you to complete by the requested input date.

Previous Next

7. Review and Assign

ary District [38050] 

My Performance Performance Tasks Management Tasks Succession Reports & Analytics Configuration Help

< Assign Review

100% Complete

- Form and Date Selection Completed
- Employee Selection Completed
- Notification Completed
- Preview and Assign Completed

Form
WAB 2020

Available
01/23/2020

Automatically prepend subject line
Yes

Employee(s)
1

Reviewer Due Date
01/30/2020

Employee Due Date

Subject
Performance Review Assigned

Message
A performance review has been assigned to you to complete by the requested input date.

Previous Assign

Previous Assign

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

Review Status My Team Journals Goal Status Feedback Status

Search Reset

Active Filters: Employee Status: Active Review Form: WAB 2018: Walk Around the Block for 2018



WAB 2018: Walk Around the Block for 2018 Status

72 26 140

72 reviews Complete (30%) 26 reviews Pending (11%) 140 reviews Overdue (59%)

The selected reviews were made live.

Assign Review Complete Re-open Make Live Send Live Review Notification Approve Delete

Review Form	Employee	Status	Reviewer	Rating	Live	Attachments	Due	Updated
WAB 2018: Walk Around the Block for 2018	 Kristin McLaren	Employee Self Appraisal Pending	Daly, Terri	0.00 / 1	✓		03/30/2018	03/23/2018

9. If Goals don't populate in the WAB, Select Add Existing Goals

The screenshot shows the 'WAB 2020' interface for Loretta McDaniel, Human Resources Generalist. The 'Add Existing Goals' button is circled in red. The interface includes a sidebar with categories: Customer Service, Comprehension and Competencies, Team Work and Relationships, and Time Management. The main area displays a 'Create Goal' button and a message: 'Outline the progress that you have made toward your goals.' Below this is a clipboard icon and the text 'Select goals to be evaluated.'

10. Select the Goals you wish to add; then SAVE

The screenshot shows the 'Select Goals' dialog box. The 'Save' button is circled in red. A red arrow points from the 'Add Existing Goals' button in the previous screenshot to this dialog. The dialog includes a warning message: 'You will be unable to remove (deselect) a goal once the other party (Employee or Reviewer) has rated that goal. If you need to remove (deselect) a goal, both parties must remove their rating.' Below this is a filter section for 'Filter goals by Start Date' with a date range of '01/23/2019 - 01/23/2020'. A table lists available goals with checkboxes for selection.

Title	Start Date	Status	Category
<input type="checkbox"/> Professional Development	02/01/2019	Active	2019 SMART GOALS
<input type="checkbox"/> Onboarding and Orientation Project	02/01/2019	Active	2019 SMART GOALS
<input type="checkbox"/> Payroll Presentation for Managers	02/01/2019	Active	2019 SMART GOALS
<input type="checkbox"/> Benefits Administration Lead	02/01/2019	Active	2019 SMART GOALS
<input type="checkbox"/> 2020 HR Goal	11/01/2019	Active	2020 SMART GOALS
<input checked="" type="checkbox"/> Increase Program Attendance	11/01/2019	Active	2020 SMART GOALS
<input checked="" type="checkbox"/> Book Shelving Rate	11/01/2019	Active	2020 SMART GOALS
<input checked="" type="checkbox"/> Fundraising	11/01/2019	Active	2020 KEY RESULTS
<input checked="" type="checkbox"/> Plan and Provide Outreach to 3 new groups	11/01/2019	Active	2020 SMART GOALS

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

Review Status | My Team | Journals | Goal Status | Feedback Status

Filter: mclaren Search Reset

Active Filters: Employee Status: Active Review Form: WAB 2018: Walk Around the Block for 2018

WAB 2018: Walk Around the Block for 2018 Status

72 26 140 238 Total

72 reviews Complete (30%) 26 reviews Pending (11%) 140 reviews Overdue (59%)

Assign Review Complete Re-open Make Live Send Live Review Notification Approve Delete

Review Form	Employee	Status	Reviewer	Rating	Live	Attachments	Due	Updated	Actions
WAB 2018: Walk Around the Block for 2018	Kristin McLaren	Assigned	Daly, Terri	0.00 / 1			03/30/2018	03/23/2018	...
WAB 2018: Walk Around the Block for 2018	Kristin McLaren	Reviewer Signature Pending	Daly, Terri	0.80 / 1	✓		03/08/2018	03/21/2018	...
WAB 2018: Walk Around the Block for 2018	Kristin McLaren	Complete	Daly, Terri	0.80 / 1			02/09/2018	03/01/2018	...

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.