ASSIGNING AND TRACKING THE WAB IN PAYLOCITY

I. ASSIGNING THE WAB

1. From Web Pay, go to Talent > Management Tasks

Pueblo Regional Library District [38050]	paylocity	0
Sweb Pay Home Employees HR Payroll Company Applicant	Talent Tax & Finance Reports & Analytics Tools Notifications	Help
Home Directory Impressions Teams	My Performance Review	
Home Directory Impressions Teams	Review Forms Setup	
Terri Daly 🗸	Management Tasks	
	Performance Tasks	

2. Select the Review Status tab, then Assign Review.

eview Status My Team Jour	nals Goal Status Feedback Status		
Filter V Last, First, Form, Status		Q Search Reset	
ve Filters: 🛛 🗙 Employee Status: Active	🗙 Review Form: WAB 2018: Walk Around the Block for 2	:018	
VAB 2018: Walk Around the Bloc	< for 2018 Status		
VAB 2018: Walk Around the Bloc	x for 2018 Status		139 241
			139 241 Total

3. Select WAB 2018: Walk Around the Block for 2018

Pay Home Employees	HR Payroll	Company Applicant	Talent Tax & Finance	Reports & Analytics	Tools	Notifications		
eview Status My Team Journal	ls Goal S	tatus Feedback Sta	atus					
Filter V Last, First, Form, Status				Q Search	Reset			
tive Filters: $ imes$ Employee Status: Active $ imes$	×Review Form	: WAB 2018: Walk Around t	he Block for 2018					
WAB 2018: Walk Around the Block f	or 2018 Stat	us						
		Assign Reviev	V			×		
73 reviews Complete (30%) 📕 29 review	vs Pending	Company (required)		Review Form (r	equired)			
🖄 Assign Review	🗂 Re-ope	Pueblo Regional Library	District [38050]	Select	2	v .		
	Employee	Save Cancel			nual Perf	nce Review formance Review for Managers id the Block for 2018	chments	Due
WAB 2018: Walk Around the Block for	Kristm w	ILLAIEII	Appraisal Daly, T	erri		0.0071	00	03/

4. Enter in the <u>Review Available Date</u> (usually the date you are initiating), the <u>Review Due Date</u> (the date you wish the WAB to be due) and <u>Assign to Employees</u> field (which employees you would like to select.)

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ournal		Gc	Assign Re	eview					×	
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ive 🕻	× Revie	ew F	Employee Revie	ew Available Date	(required)	Review Due Da	i te (requi	ired)		
ock fo	or 201	18 5								
			Assign to Emplo	oyees (required)						
review	/s Pend	ling								
			Initial Notificat							
	⇔ Re	_	Availability happ	pens. If a review is	assigned in the	e Friday before the wee same week that the em Friday of the current w	ployee Re		s,	
	Employ	vee	Employee Notif	fication		Reviewer Notif	ication			chm
for	🚺 к	rist	Notify			Notify				06
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for	🔊 к	rist	Review Type			Performance A	ppraisal	Туре		00
	-		Manual			N/A				
			posico de la			F 6-16				
			Save	Cancel						





After selecting the Make Live icon, you will see a checkmark in the Live column.

Revie	ew Status	My Team Journals	Goal Status	Feedback Status								
Filte	er 🗸 🛛 mcla	ren				Q Search	Reset					
Active	Filters: XI	Employee Status: Active 🛛 🗙 Re	view Form: WAB 2018	3: Walk Around the Block	(for 2018							
WA	B 2018: Wa	k Around the Block for 2	018 Status									
			72	26							140	23
7	72 reviews Com	plete (30%) 📕 26 reviews Pe	nding (11%) 📕 140	0 reviews Overdue (59%	6)							Tc
⊘ т	he selected rev	iews were made live.										
Ê	Assign Review	🖒 Complete 🛨	Re-open 🕞 M	lake Live	d Live Review Notifi	ation 🖉 Ap	prove X Delete					
E F	Review Form	Empl	oyee	Status	Reviewe	ir.	Rating	Live	Attathments	Due \smallsetminus	Updated	
	WAB 2018: Wal 2018	k Around the Block for	Kristin McLaren	Emplo Appra Pendir		rri	0.00 / 1	\checkmark	•@	03/30/2018	03/23/201	18

II. TRACKING THE WALK AROUND THE BLOCK

While in the Review Status tab, WAB for each employee	you w	ill note tha	at you can se	e th	e statu	is of ea	ach	
Review Status My Team Journals Goal Status Feedback Sta	atus							
Filter V mclaren		Q Search	Reset					
Active Filters: XEmployee Status: Active XReview Form: WAB 2018: Walk Around 1	the Block for 2018							
WAB 2018: Walk Around the Block for 2018 Status								220
72 72 reviews Complete (30%) 26 reviews Pending (11%) 140 reviews Over	4 rdur (59%)						140	238 Total
😰 Assign Review 🖞 Complete 🖆 Re-open 🖓 Make Live	\triangle Send Live Rev	view Notification	Approve X Delete					
Review Form Employee	Status	Reviewer	Rating	Live	Attachments	Due \vee	Updated	Actions
WAB 2018: Walk Around the Block for 2018 Kristin McLaren	Assigned	Daly, Terri	0.00 / 1		00	03/30/2018	03/23/2018	000
WAB 2018: Walk Around the Block for 2018 Kristin McLaren	Reviewer Signature Pending	Daly, Terri	0.80 / 1	\checkmark		03/08/2018	03/21/2018	000
WAB 2018: Walk Around the Block for 2018 Kristin McLaren	Complete	Daly, Terri	0.80 / 1		00	02/09/2018	03/01/2018	000

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.