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
③ Web Pay Home Employees HR Payroll Company Applicant	Talent Tax & Finance Reports & Analytics Tools Notifications	Help
	My Performance Review	
Home Directory Impressions Teams	Review Forms Setup	
Terri Daly Y	Management Tasks	
	Performance Tasks	

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

Web Pay L Home Employees HR Payroll Company Applicant Talent Tax & Finance Reports & Analytics Tools Notifications	Hel
Review Status My Team Journals Goal Status Feedback Status	
Filter Last, First, Form, Status Q, Search Reset	
Active Filters: X Employee Status: Active X Review Form: WAB 2018: Walk Around the Block for 2018 WAR 2019: Walk Around the Block for 2018 Status	
73 29 139	241
73 reviews Complete (30%) 📃 29 reviews Pending (12%) 📕 139 reviews Overdue (58%)	Total
🛱 Assign Review 😰 Complete 🖆 Re-open 🖓 Make Live 🔔 Send Live Review Notification 🖉 Approve 🔀 Delete	

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

Pay Home Employ	ees HR Payroll	Company Applicant Taler	it Tax & Finance	Reports & Analytics	Tools Notifications			
eview Status My Team	ournals Goal	Status Feedback Status						
Filter V Last, First, Form, Status				Q Search	Reset			
tive Filters: X Employee Status: Act	ive 🛛 🗙 Review Form	n: WAB 2018: Walk Around the Blo	ck for 2018					
WAB 2018: Walk Around the B	lock for 2018 Sta	tus						
		Assign Review				×		
73 reviews Complete (30%) 📕 29) reviews Pending	Company (required)		Review Form (r	equired)			
Assign Review	🖆 Re-ope	Pueblo Regional Library Distri	rt [38050]	Select		•		
Review Form	Employee	Save Cancel		2017 Annual Managers: Ar WAB 2018: W	Performance Review nnual Performance Review alk Around the Block for 2	/ for Managers 2018	chments	Due
WAB 2018: Walk Around the Block	for Kristm	Appr	aisal Daiy, T	erri	0.00 / 1	\checkmark	00	03/3

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.)

ees H	HR Pa	ayroll	Company	Applicant	Talent	Tax & Finance	Repo	rts & Analytics	Tools	Notifications			-
ournals		Gc	Assigr	n Review	V							X	
			Company	(required)				Review Form (required	1			
			Pueblo Re	gional Librar	y District	[38050]		WAB 2018: W	/alk Arou	nd the Block for 2	2018 🔻		
ive >	× Reviev	N F	Employee	Review Avai	lable Dat	e (required)	(Review Due Da	ate (requ	ired)	5		
ock fo	or 201	8 5											
			Assign to	Employees (I	equired)								
review	/s Pendi	ng											
												-	
			Initial Not	ification									
	t⊃ Re-	ope	Employee: Availability the Emplo	s and Review y happens. If yee and Revi	ers are no a review i ewer will	ormally notified th s assigned in the be notified on the	ie Friday same w Friday (v before the we eek that the em of the current w	ek that Er iployee R veek.	nployee Review eview Availability	falls,		
ł	Employe	e	Employee	Notification				Reviewer Noti	fication				cnm
for	🚺 Kr	ist	🕑 Notify					Notify					00
	•		Do Not Se	end 🔻				Do Not Send	•				
for(Kr	ist	Before Du	ue Date 🔻				Before Due Da	ate 🔻				0@
for	Kr	ist	Review Ty	pe				Performance /	Appraisal	Туре			00
	9		Manual					N/A					
			Desire Co										•
			Save	Cancel									
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After selecting the Make Live icon, you will see a checkmark in the Live column.

Rev	iew Status	My Team Journals Goal Status Fe	edback Status								
Filt	er 🗸 🛛 mcla	ren		C	२ Search Res	et					
Active	e Filters: 🗙	Employee Status: Active 🛛 🗙 Review Form: WAB 2018: Wa	lk Around the Block for 2018								
WA	AB 2018: Wa	lk Around the Block for 2018 Status									
		72	26							140	23
	72 reviews Con	iplete (30%) 🗧 26 reviews Pending (11%) 📕 140 rev	iews Overdue (59%)								Тс
\bigcirc	The selected rev	iews were made live.									
Î	Assign Review	Complete 🗠 Re-open 🕓 Make	Live	view Notification	⊘ Approve	X Delete					
	Review Form	Employee	Status	Reviewer		Rating	Live	Attathments	Due \smallsetminus	Updated	
	WAB 2018: Wal 2018	k Around the Block for 🛛 👔 Kristin McLaren	Employee Self Appraisal Pending	Daly, Terri		0.00 / 1	\checkmark	•@	03/30/2018	03/23/201	8

II. TRACKING THE WALK AROUND THE BLOCK

While in the Review Status tab, WAB for each employee	, you will note that y	ou can se	e th	ne statu	is of ea	ach	
Review Status My Team Journals Goal Status Feedbick St	tatus						
Filter V mclaren	Q Search	Reset					
Active Filters: \times Employee Status: Active \times Review Form: WAB 2018: Walk Arou d	I the Block for 2018						
WAB 2018: Walk Around the Block for 2018 Status						140	000
72 reviews Complete (30%) 26 reviews Pending (11%) 140 reviews Over	rdu (59%)						ZOO Total
🛱 Assign Review 🔯 Complete 🖆 Re-open 🖯 Make Live		/e X Delete					
Review Form Employee	Status Reviewer	Rating	Live	Attachments	Due \lor	Updated	Actions
WAB 2018: Walk Around the Block for 2018 Kristin McLaren	Assigned Daly, Terri	0.00 / 1			03/30/2018	03/23/2018	000
WAB 2018: Walk Around the Block for 2018 Kristin McLaren	Reviewer Signature Daly, Terri Pending	0.80 / 1	\checkmark	00	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.