Review Process Guide

Performance Excellence Guide for Administrators

Overview

As HR Administrators in your school or unit, this guide will help you to:

- monitor review status
- change the status of an individual review (submit, re-open, create, cancel)

Prepare

Login to myHR Learn at learn.northwestern.edu

Access your school or unit reviews as a group

1. From the Home page, click ADMIN along the purple menu bar.

2. Click the tile that says PERFORMANCE ADMIN, and then MANAGE REVIEWS.

3. Your page should now say “Search for Review Cycles.” To find the current year’s Performance Reviews for your school or unit, type the current fiscal year (i.e. 2018) in the “Cycle Name” box and click SEARCH.

4. Locate the current fiscal year performance cycle in the search results, and click MONITOR REVIEWS. Note: there may be a long pause while the next page loads.
5. The next page provides a Review Summary, showing total number of reviews within your school, unit or department that are in each stage of the cycle, or “review step.” To see a list of individual reviews within a particular step, click on the number next to that step.

Access an individual review, edit stage or change owner

1. From the Home page, click ADMIN along the purple menu bar.

2. Click on PEOPLE (on sub-menu) and then MANAGE PEOPLE, and REVIEWS along the left sidebar.

3. Enter the name or NetID of the individual whose review you wish to access in the “Reviewee” field.

4. Click the magnifying glass next to their name, and select their NetID and name from the dropdown below. Their NetID will be populated in the “Reviewee” field.

5. Then click SEARCH. Their review will display in search results below.

6. Hover over the “Review name” (Performance Year, etc) and click on VIEW DETAILS in the bubble that appears above.

7. The review will pop up in its own window. Scroll to the bottom, and click on MORE ACTIONS. The options available will be dependent on the review’s current step. From here, you may:

   a. Select MOVE TO DRAFT, which will move a review one-step backward from activated. This keeps the review in the system, removing it from the staff member’s and supervisor’s view until reactivated.

   b. Select CANCEL REVIEW, which will pull a review out of the normal cycle of steps. This selection keeps the review in the system, and it will be removed from the staff member’s and supervisor’s view.

   c. Select REOPEN REVIEW, which will allow you to re-open the supervisor and/or the staff member’s step of the review.
d. Select **SEND REMINDER**. This choice does not impact the review step, but will provide an opportunity to send a quick message to the staff member and/or supervisor who may benefit from a reminder about review actions needed.

e. In general, do not select **CHANGE REVIEW OWNER**. To change the review owner follow these steps:

   i. All changes to review owners should be made in myHR itself (formerly known as FASIS) by changing the “Performance Evaluation Reports to” field for a staff member.

   ii. Assuming that the Reports to change in myHR has an effective date of today, the change will be reflected in myHR Learn in approximately 15 minutes.

   iii. After you have made the change for an individual in myHR, please return to their review in myHR Learn and click **UPDATE next to “review owner.”**

8. Once you have completed your action, close the review window.

**Create a review (assign a review to a staff member)**

1. From the Home page, click **ADMIN** along the purple menu bar.

2. Click the tile that says **PERFORMANCE ADMIN**, and then **MANAGE REVIEWS**.

3. Your page should now say “Search for Review Cycles.” To find the current year’s Performance Reviews for your school or unit, type the current fiscal year (i.e. 2018) in the “Cycle Name” box and click **SEARCH**.

4. Locate the current fiscal year performance cycle in the search results, and click **MONITOR REVIEWS**. **Note: there may be a long pause while the next page loads.**

5. Select **CREATE REVIEWS** in small print above “Review Summary.”

   **Monitor Review Cycle: Performance Year 2017-2018**

   Name: Performance Year 2017-2018 (090517-1230PM)
   Status: Activated
   Total Reviews: 416
   Create Reviews Create Bulk Reviews Create

6. A pop-up window will appear. Check the Performance Year for which you are creating a review, or...

7. In the next search, enter the First and/or Last name of the staff member and click the **SEARCH** button.
8. Your search results will appear below. Check the box next to the correct person, and then click SELECT.

9. The pop-up will close. Wait a few seconds, and your "Monitor Review Cycle" page will automatically refresh, showing a new review in the draft step.

10. Click ACTIVATE next to the number in draft, and confirm your choice. Now this staff member will have a review available to them in myHR Learn. Note: the system prevents duplicate reviews for staff. If this staff member already has a review assigned to them, the system will show an error message when the page refreshes.