

Reporting: RPT – Performance Review

What is a Performance Review?

Performance Review is a tool associated with the Employee Feedback cycle used to evaluate an employee's performance usually on an annual basis. The review captures summary comments of the employee's accomplishments, strengths, and opportunity areas in the categories of Geisinger Values and Corporate Compliance, job responsibilities, and goals. The review includes an overall rating and will be discussed between and acknowledged by the employee and the manager.

IMPORTANT DEFINITIONS

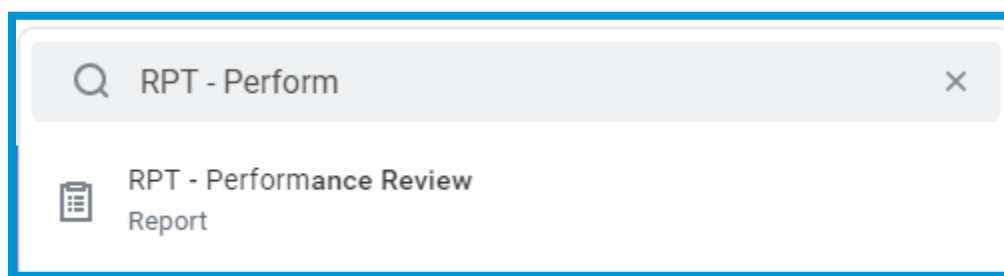
Review Template is used to identify the different types of performance reviews.

Transaction Status – In Progress or Successfully Completed. The performance review is considered successfully completed after the manager submits Step 4.

Overall Rating – Manager is the overall rating from the manager once the evaluation is successfully completed.

Running the Report

To generate this report, type **RPT – Performance Review** in the Workday search bar. Click on the report name.



Note: This report is designed for managers and will only display data for workers that roll up to the manager.

Reporting: RPT – Performance Review

Prompts

The screenshot shows a dialog box titled "RPT - Performance Review". It contains several fields and options:

- 1**: A dropdown menu for "Supervisory Organizations" with a red asterisk to its right.
- 2**: A checked checkbox for "Include Subordinate Organizations".
- 3**: A list of "Review Template" options, including "2021 Annual Performance Review - Employee/Provider", "2021 Annual Performance Review - Manager", "2021 Annual Performance Review - Manager Research", and "2021 Annual Performance Review - Research".
- A dropdown menu for "Worker".
- An unchecked checkbox for "Include Terminated Workers".
- "OK" and "Cancel" buttons at the bottom.

1 ORGANIZATIONS
You can choose the supervisory organizations*. Please be sure to select all the applicable organizations.

2 INCLUDE SUBORDINATE ORGANIZATIONS
If you choose the top-level supervisory organizations under **Organizations**, you should check this box to see all the individuals that roll up to those sup orgs.

3 REVIEW TEMPLATE
This defaults to the reviews used during the current review process.

***Supervisory organizations** represent the reporting hierarchical structure in Workday. Each manager has two supervisory organizations – one for each type of staffing model. For more information, view [this job aid](#).



Note: Once you click **OK**, the report may take a while to run. If it takes too long, a new pop-up box will appear, and you can select **Notify Me Later**. Then you'll get a notification that the report is ready and available to download in Excel format.

Reporting: RPT – Performance Review

Reviewing the Data

TABLE

This report shows **the most recent performance review rating** along with **real-time** relevant information such as **demographic information** and the **status of the review**.

Transaction Status	Current Step	Awaiting Persons	Direct Supervisor Last Name	Direct Supervisor First Name	Overall Rating - Manager
In Progress	Complete Manager Evaluation for Performance Review	Susan Smith	Smith	Susan	2- Valued Contributor
Successfully Completed	Provide Employee Review Comments	Bob Jones	Smith	Susan	2- Valued Contributor
Successfully Completed	Provide Employee Review Comments	Eric Johnson	Smith	Susan	2- Valued Contributor
Successfully Completed	Provide Employee Review Comments	Victoria Newman	Smith	Susan	2- Valued Contributor
Successfully Completed			Smith	Susan	2- Valued Contributor



NOTE: You can also export the document to Excel  .

Reporting: RPT – Performance Review

DATA ELEMENTS

There is a lot of information on this report. The most important items are:

CURRENT STEP indicates where each performance review is in the overall process.

Step 1	Complete Self Evaluation	The form is with the employee to complete the self-evaluation.
Step 2	Manager Evaluation for Performance Review	The employee submitted the self-evaluation, or the manager has moved the self-evaluation forward. The form is with the manager.
Step 3	Provide Employee Review Comments	The manager submitted the review, and the form is with the employee for final comments / acknowledgement.
Step 5	Provide Manager Review Comments	The employee submitted the form to the manager for final comments/acknowledgement. Once the manager submits this step, the form is complete .

AWAITING PERSONS is the person(s) currently responsible for completing the step. If the awaiting person is not the employee or direct supervisor, it may be assigned to:

HR colleagues: the review is pending approval for reassignment.

Multiple supervisors including the direct supervisor: the supervisor may have Matrix managers, and no one has started the task.

An individual other than the employee/supervisor/Matrix managers: the form has been reassigned to that person.

BLANK SPACES appear for Current Step & Awaiting Persons when the review has completed all 5 steps.

Have Questions? Contact our HR Technology team at
HR_Data_Request@geisinger.edu
