

# Performance Reviews

Completing Performance Reviews in UKG



# Workflow

## With Delegation:

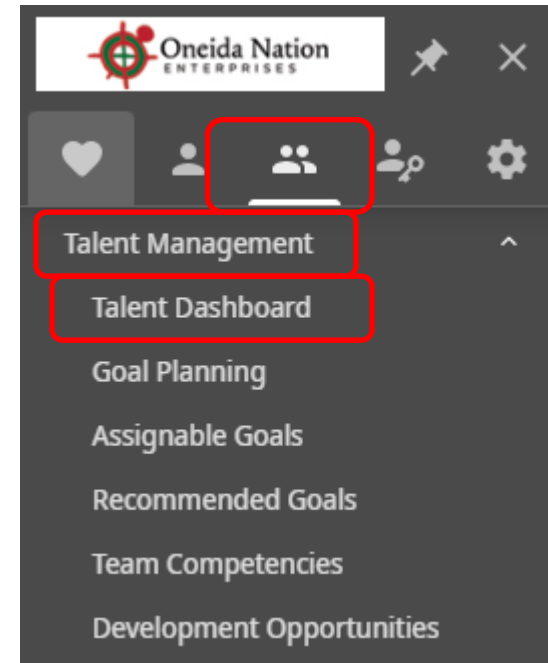
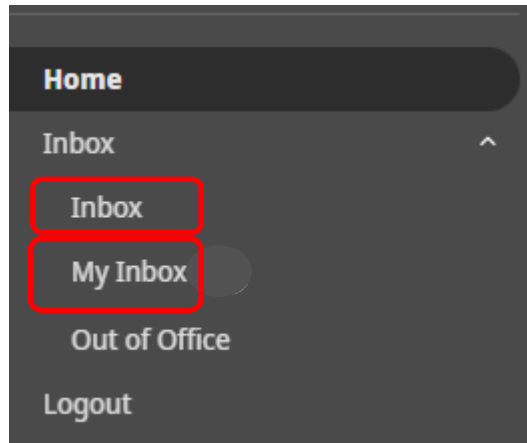
- HRIS to Distribute
- Manager I
  - Manager I > delegates to Supervisor
  - Supervisor completes review
  - Supervisor > delegates back to Manager I
- Manager I
- Manager II
- Manager I
- Employee

## Without Delegation:

- HRIS to Distribute
- Manager I completes review
- Manager II
- Manager I
- Employee

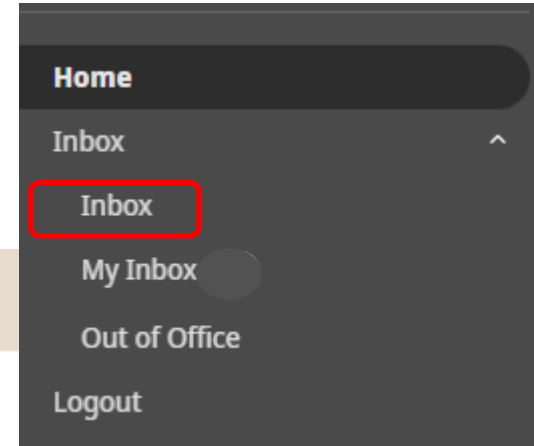
# Step-by-Step with Delegation

- HRIS distributes review
- Manager receives notifications in their UKG Inbox and their Outlook Inbox

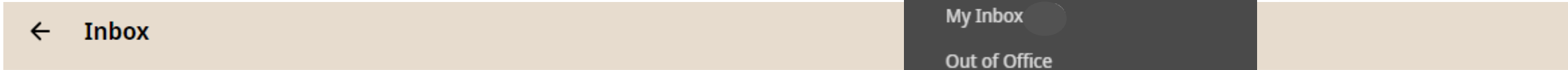


# Accessing the Review

➤ From UKG Inbox



A dark grey navigation menu overlay with the following items: Home, Inbox (with an upward arrow), Inbox (highlighted with a red box), My Inbox, Out of Office, and Logout.



A light brown header bar containing a left-pointing arrow and the text "Inbox".

## Requests

Requests

To do ▾



edit labels | print | help >

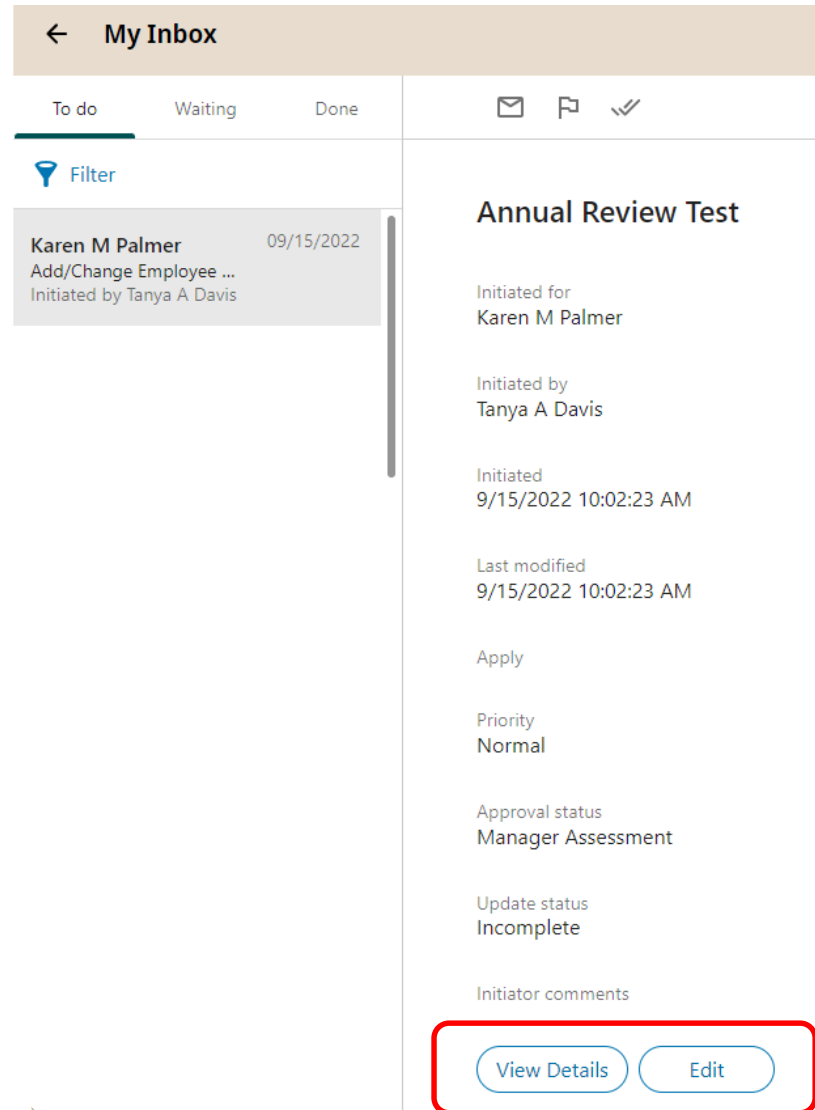
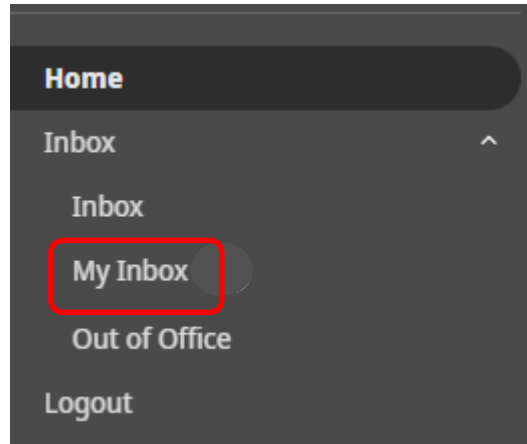
Find by  From  To   Filtered by Initiated date range is between 09/08/2022 and 09/15/2022 [\[Clear Filters\]](#) Displaying all records

Initiated	Type	Description	Priority ↑	For	By	Approval	Status	Update	
<a href="#">09/15/2022 10:02:23 AM</a>	Employee	Annual Review Test	Normal	Karen M Palmer	Tanya A Davis	Manager Assessment	Incomplete		<a href="#">Edit</a>

Timestamp Link

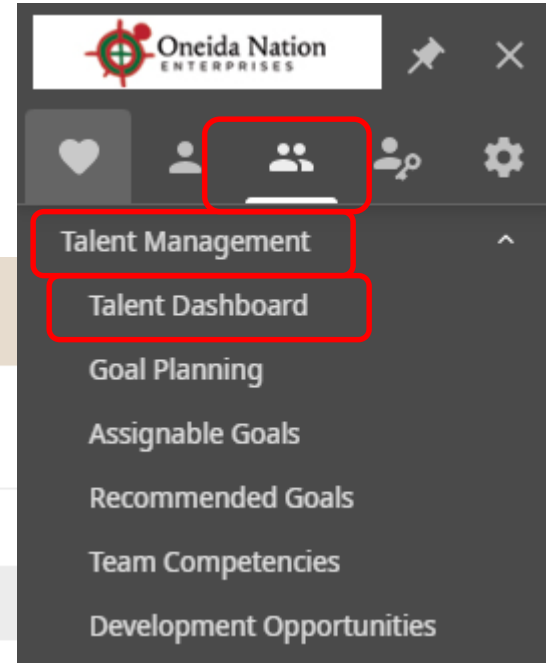
# Accessing the Review

➤ From UKG My Inbox



# Accessing the Review

➤ From Talent Dashboard



← Talent Dashboard

## Talent Dashboard

▶ Team Analytics & News

The screenshot shows the main content area of the Talent Dashboard. At the top, there are tabs for 'My To Do's' (with a red box around it and a red '5' badge), 'My Direct Reports', and 'My Entire Team'. Below the tabs are three cards: 'Reviews' (with a red box around it and a green '5' badge and 'Outstanding Reviews' text), 'Goal Plans' (with a green '0' badge and 'Pending Approval' text), and 'Leadership Actions' (with a green '0' badge and 'Outstanding Actions' text). At the bottom, there is a search bar with 'Find by Last name' and 'Starts With' dropdowns, a search icon, and a 'Compare' button.

# Clicking View Details or Timestamp Link

- Takes you to the Request Details page and where the option to Delegate is found

The screenshot displays a web interface for managing requests. At the top, there is a navigation bar with a back arrow and the text 'Inbox'. Below this, the 'Requests' section is visible, featuring a search filter for 'Initiated date range' from '09/08/2022' to '09/15/2022'. A table lists requests with columns for 'Initiated', 'Type', and 'Description'. One request is highlighted with a red box around the timestamp '09/15/2022 10:02:23 AM', and a red arrow points from this box to the 'Request Details' page. The 'Request Details' page shows information for 'Employee Add/Change Employee Review', including the initiator 'Karen M Palmer' and the status 'Normal'. On the right side, a sidebar titled 'Things I Can Do' contains a 'Delegate' link, which is also highlighted with a red box.

Initiated	Type	Description
<a href="#">09/15/2022 10:02:23 AM</a>	Employee	Annual Review Test

### Request Details

**Employee Add/Change Employee Review**

Initiated for	Karen M Palmer	Priority	Normal
Initiated by	Tanya A Davis	Approval status	Manager Assessment
Initiated	09/15/2022 10:02:23 AM	Update status	Incomplete
Last modified	09/15/2022 10:02:23 AM	Initiator comments	

Apply

#### Approver History

Date & Time	Approver	Action	Comments
No records found			

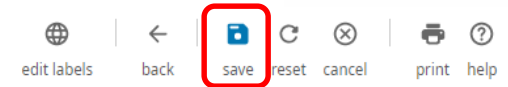
Things I Can Do

- For This Page
- [Delegate](#)

# Clicking Delegate

- Here is where the Manager would select the appropriate Supervisor to complete the Manager Assessment task
  - The manager would click the magnifying glass to find the Supervisor's name, select and then hit Save in the top right hand corner of the screen

## Delegate Request



### Employee Add/Change Employee Review

Initiated for	Karen M Palmer	Priority	Normal
Initiated by	Tanya A Davis	Approval status	Manager Assessment
Initiated	09/15/2022 10:02:23 AM	Update status	Incomplete
Last modified	09/15/2022 10:02:23 AM	Initiator comments	
Apply			

### Delegates

Task	Assigned To	Delegated To
Manager Assessment	Davis, Tanya A	<input type="text"/> 🔍 ✕



# Clicking Edit

➤ Takes you to the Review Summary page where the Reviewer can Start the Review

**Review Summary**

edit labels | back | print full review | help

**Annual Review Test**  
Karen M Palmer, HRIS ANLST [Employee Notes](#)  
Effective Date 09/15/2022

Complete all requested information.

**Contributors**

Tanya A Davis → Karyn J Chase → Karen M Palmer

**Review sections**

	Manager Rating	
Competencies	—	<a href="#">Start</a>
Overall Comments	N/A	<a href="#">Start</a>
Final Score	—	

**Send**

Send to the next contributor.


Send **forward** to Karyn J Chase

[Send](#)

Routing Comments  
These comments will not appear on the final review and are visible to all review contributors.

← You can see the contributor path

← Here is where you start the review



# Completing the Review

- Supervisor/Manager will complete the competencies by clicking the appropriate number of stars and including notes in the comments section

Annual Review Test

## Karen M Palmer - Competencies

Complete the Competencies by clicking the appropriate number of stars and include comments to support the rating.

Rating Scale [Five Point](#)

save reset cancel **save & close** print help

### 1. ▾ Adaptability

- Is open-minded and finds opportunity in change.
- Has a positive and supportive attitude about doing and learning new things.
- Openly accepts and supports change. Is viewed as a role model for embracing change.

[Show details...](#)

[Notes](#)

Melissa D Obrien, Manager

4 - Highly Effective

Good job!

Competency Weight: 12%

### 2. ▾ Communication

- Openly exchanges information in a timely, candid and respectful manner.
- Listens well. Writes and speaks clearly and concisely.

Competency Weight: 12%




Save – saves your work and keeps you on this page

Save & Close – saves your work and closes this page taking you to the Review Summary page



# Saving and Closing

## Review Summary

 back |  print full review |  help

### Annual Review Test

Karen M Palmer, HRIS ANLST [Employee Notes](#)  
Effective Date 09/15/2022

Complete all requested information.

### Contributors

Melissa D Obrien → Karyn J Chase → Administrator → Karen M Palmer

### Review sections

✔ Competencies Completed

Overall Comments

Final Score

#### Manager Rating

4.63 - Highly Effective

N/A

4.63 - Highly Effective

Edit

Start

### Send

Send to the next contributor.

Send **forward** to Karyn J Chase

Send

#### Routing Comments

These comments will not appear on the final review and are visible to all review contributors.

Saving and Closing brings you back to the Review Summary page, but you can still make edits.

After rating each Competency, you are able to send the review forward, however the Supervisor will need to delegate back to the Manager.



# Supervisor routing back to Manager I





- Once the Supervisor has saved and closed the Review, they can:
  - Delegate the review back to Manager I by going back to their UKG Inbox, selecting View Details or Timestamp link and delegating from the right-hand side of the screen
  - Send the review forward to the next contributor – Manager II

The screenshot displays the UKG software interface. At the top, there is a navigation bar with a back arrow and the word 'Inbox'. Below this, the 'Requests' section is visible, including a filter dropdown set to 'To do'. A search bar is present with filters for 'Initiated date range' from '09/08/2022' to '09/15/2022'. A table of requests is shown with columns for 'Initiated', 'Type', and 'Description'. One request is highlighted with a red box around the timestamp '09/15/2022 10:02:23 AM', and a red arrow points from this box to the 'Request Details' view. The 'Request Details' view shows information for 'Employee Add/Change Employee Review', including initiator details and status. On the right side, a 'Things I Can Do' sidebar is visible, with a red box around the 'Delegate' link under the 'For This Page' section. Below the request details, there is an 'Approver History' table.

Date & Time	Approver	Action	Comments
09/15/2022 10:30:48 AM	Davis, Tanya A	Delegate	The Manager Assessment task has been delegated from Davis, Tanya A to Obrien, Melissa D

# Manager I can Edit or Send Forward

## Review Summary

 edit labels |  back |  print full review |  help

### Annual Review Test

Karen M Palmer, HRIS ANLST [Employee Notes](#)

Effective Date 09/15/2022

Complete all requested information.

### Contributors

Tanya A Davis



Karyn J Chase




Administrator



Karen M Palmer

### Review sections

 Competencies  
Completed

Overall Comments

Final Score

#### Manager Rating

4.63 - Highly Effective

N/A

4.63 - Highly Effective

Edit

Start

Send

### Send

Send to the next contributor.

Send **forward** to Karyn J Chase

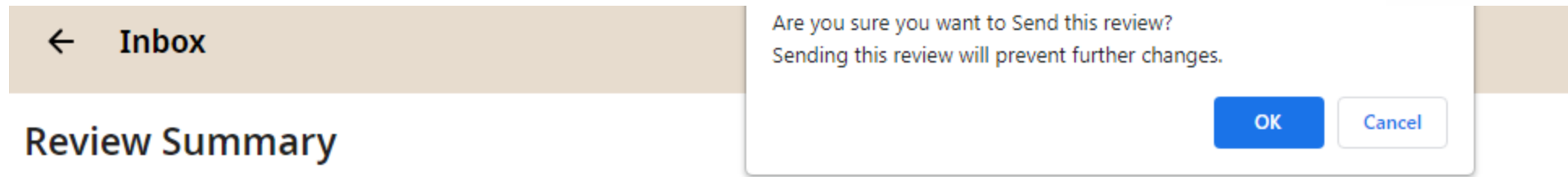
Routing Comments

These comments will not appear on the final review and are visible to all review contributors.



# Sending Forward Prompt

- Clicking the Send button prompts a pop-up box to ensure you want to send the review
- Click OK to send the review



# Manager II Inbox Access

## Requests

🖨️ ? <  
print help

Requests  
To do ▾

Find by Initiated date range ▾ From 09/09/2022 📅 To 09/16/2022 📅 🔍 Search

Filtered by: Initiated date range is between 09/09/2022 and 09/16/2022 [\[Clear Filters\]](#)

Displaying all records

Initiated	Type	Description	Priority ↑	For	Initiated By	Approval	Status	Update	
<a href="#">09/15/2022 10:02:23 AM</a>	Employee	Annual Review Test	Normal	Karen M Palmer	Tanya A Davis	Manager II Acknowledgement	Incomplete	<a href="#">Edit</a>	

# Clicking Timestamp Link

➤ Brings you to the Request Details page where you can see the Approver History

☰ ← **Inbox** 🔍 🔔<sup>20</sup> 💬 ? 👤

## Request Details

← | 🖨️ | ? | <  
back | print | help

Initiated by	Tanya A Davis	Approval status	Administrator Acknowledgement
Initiated	09/15/2022 10:02:23 AM	Update status	Incomplete
Last modified	09/15/2022 10:02:23 AM	Initiator comments	

Apply

### ▼ Approver History

Date & Time	Approver	Action	Comments
09/15/2022 10:30:48 AM	Davis, Tanya A	Delegate	The Manager Assessment task has been delegated from Davis, Tanya A to Obrien, Melissa D
09/15/2022 10:53:47 AM	Obrien, Melissa D	Delegate	The Manager Assessment task has been delegated from Obrien, Melissa D to Davis, Tanya A
09/15/2022 11:02:41 AM	Davis, Tanya A	Delegate	The Manager Assessment task has been delegated from Davis, Tanya A to Obrien, Melissa D
09/15/2022 11:28:15 AM	Obrien, Melissa D	Delegate	The Manager Assessment task has been delegated from Obrien, Melissa D to Davis, Tanya A
09/16/2022 7:33:18 AM	Davis, Tanya A	Start task	
09/16/2022 7:33:19 AM	Davis, Tanya A	Complete task	



# Clicking Edit from Inbox - Manager II can View, Send Back for Changes, or Send Forward to Manager I to meet with Employee

**Review Summary**

Annual Review Test  
Karen M Palmer, HRIS ANLST [Employee Notes](#)  
Effective Date 09/15/2022

Complete all requested information.

**Contributors**

Tanya A Davis → Karyn J Chase → Karen M Palmer

**Review sections**

	Manager Rating	
Competencies	4.63 - Highly Effective	<b>View</b>
Overall Comments	N/A	<b>Start</b>
Final Score	4.63 - Highly Effective	<b>Send</b>

**Send**

Send to the next contributor.

- Send **forward** to Tanya A Davis
- Send **back** to Tanya A Davis for changes

Routing Comments

These comments will not appear on the final review and are visible to all review contributors.

# Manager II View

☰ ← **Inbox**

Annual Review Test

## Karen M Palmer - Competencies

Complete the Competencies by clicking the appropriate number of stars and include comments to support the rating.  
Rating Scale [Five Point](#)

back print help

- Has a positive and supportive attitude about doing and learning new things.
- Openly accepts and supports change. Is viewed as a role model for embracing change.

[Show details...](#)

[Notes](#)

Tanya A Davis, Manager  
★★★★☆  
4 - Highly Effective

Good job!

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2. ▾ **Communication** Competency Weight: 12%

- Openly exchanges information in a timely, candid and respectful manner.
- Listens well. Writes and speaks clearly and concisely.
- Demonstrates respect for all individuals in all forms of communication.

[Show details...](#)

[Notes](#)

Tanya A Davis, Manager  
★★★★☆  
4 - Highly Effective

No comments are available.



# Manager II sends to Manager I to Complete

The screenshot shows a review summary page for 'Annual Review Test' by Karen M Palmer. The review is currently assigned to Karyn J Chase. The 'Review sections' table shows a Manager Rating of 4.63 - Highly Effective. The 'Send' button is circled in red and labeled '1'. The 'Send' button is circled in red and labeled '2'. A confirmation dialog box is circled in red and labeled '3'.

**1 Send**  
Send to the next contributor.  
 Send **forward** to Tanya A Davis to Sign & Complete  
 Send **back** to Tanya A Davis for changes

**2 Send**

**3** e14.ultipro.com says  
Are you sure you want to Send this review?  
Sending this review will prevent further changes.  
OK Cancel

Review sections	Manager Rating
Competencies	4.63 - Highly Effective
Overall Comments	N/A
Final Score	4.63 - Highly Effective

The review is sent back to Manager I for them to review with the Employee, and then have the employee Sign & Complete.



# Manager I Inbox Access

← Inbox

## Requests

 |   >  
edit labels | print | help


### Requests

To do ▾

Find by  From  To

Filtered by Initiated date range is between 09/09/2022 and 09/16/2022 [\[Clear Filters\]](#)

Displaying **all** records

Initiated	Type	Description	Priority ↑	For	By	Approval	Status	Update	
<a href="#">09/15/2022 10:02:23 AM</a>	Employee	Annual Review Test	Normal	Karen M Palmer	Tanya A Davis	Review Accepted	Incomplete	<a href="#">Edit</a>	

# Clicking Edit from Inbox – Manager I can View, Send Back for Changes, or Send Forward to Employee to Sign & Complete

← Inbox

## Review Summary

edit labels | back | print full review | help

**Annual Review Test**  
Karen M Palmer, HRIS ANLST [Employee Notes](#)  
Effective Date 09/15/2022

Complete all requested information.

### Contributors

Tanya A Davis → Karyn J Chase → Karen M Palmer

### Review sections

	Manager Rating	
✔ Competencies Completed	4.63 - Highly Effective	<b>View</b>
Overall Comments	N/A	View
Final Score	4.63 - Highly Effective	

### Send

Send to the next contributor.

- Send **forward** to Karen M Palmer to Sign & Complete
- Send **back** to Karyn J Chase for changes

Routing Comments

These comments will not appear on the final review and are visible to all review contributors.

**Send**



# Send to Employee

← **Inbox**

Are you sure you want to Send this review?  
Sending this review will prevent further changes.

3 **OK** Cancel

edit labels | back | print full review | help

### Review Summary

**Annual Review Test**  
Karen M Palmer, HRIS ANLST [Employee Notes](#)  
Effective Date 09/15/2022

Complete all requested information.

### Contributors

Tanya A Davis → Karyn J Chase → Karen M Palmer

### Review sections

	Manager Rating	
✔ Competencies Completed	4.63 - Highly Effective	2 <b>View</b>
Overall Comments	N/A	<b>View</b>
Final Score	4.63 - Highly Effective	

**Send**

1 **Send to the next contributor.**

Send **forward** to Karen M Palmer to Sign & Complete

Send **back** to Karyn J Chase for changes

**Send**

Routing Comments  
These comments will not appear on the final review and are visible to all review contributors.

The review is sent to the employee for them to Sign & Complete.

# Print Full Review (if needed)

The screenshot shows the 'Review Summary' page in the HRIS system. In the top right corner, there is a 'print full review' button, which is highlighted with a red box. Below this, the 'Print Preview' section is visible, containing a 'Print' button and a 'Save As PDF' button, also highlighted with a red box. The 'Options' section is highlighted with a red box and contains two checked options: 'Include Manager Overall Comments' and 'Include Manager II Input'. The page content includes the following sections:

- Annual Review 3**
- Karen Palmer, HRIS Analyst
- Effective date 09/20/2022
- Review Summary**
- Contributors**
  - Tanya A Davis, Manager - Due: 09/22/2022
  - Karyn J Chase, Manager II - Due: 09/27/2022

From Review Summary page, in the top right-hand corner is the option to “Print Full Review.” A new window will open where you can Print, Save as a PDF, and select the options you want to include before printing.



# Employee Inbox Access

## Requests

🖨️ ⓘ <  
print help

Requests  
To do ▾

Find by Initiated date range ▾ From 09/09/2022 📅 To 09/16/2022 📅 + - Search

Filtered by Initiated date range is between 09/09/2022 and 09/16/2022 [\[Clear Filters\]](#) Displaying **all** records

				Initiated		Status		
Initiated	Type	Description	Priority ↑	For	By	Approval	Update	🗒️
<a href="#">09/15/2022 10:02:23 AM</a>	Employee	Annual Review Test	Normal	Karen M Palmer	Tanya A Davis	Employee Acknowledgement	Incomplete	<a href="#">Edit</a>





# Clicking Edit from Inbox – Employee can view

☰ ← **Inbox**

## Review Summary

← | 🖨️ | ?  
back | print | help

**Annual Review Test**  
Karen M Palmer, HRIS ANLST [Employee Notes](#)  
Effective Date 09/15/2022

Complete all requested information.

### Contributors

Tanya A Davis → Karyn J Chase → Karen M Palmer

### Review sections

	Manager Rating	
Competencies	4.63 - Highly Effective	<b>View</b>
Overall Comments	N/A	<b>View</b>
Final Score	4.63 - Highly Effective	



# Clicking Edit from Inbox – Employee can Sign & Complete

## Review Summary

← | 🖨️ | ?  
back | print | help

## Sign & Complete

Send to the next contributor.

**Sign & Complete**

### ATTENTION!

If an employee disagrees with any of the information contained in this document, he or she can submit a written statement explaining his or her position, which will be maintained as part of his or her employee personnel file.

Acknowledgement

I have reviewed this document. My signature indicates that I have been advised of my performance status.


Final Comments

# Employee clicking OK is signing the review and sending back to Manager I



The screenshot shows a web interface for a review process. At the top left, there is a navigation bar with a hamburger menu icon, a back arrow, and the text "Inbox". Below this is a "Review Summary" section. A modal dialog box is open in the center, with a title "Are you sure you want to Sign & Complete this review?" and a subtitle "Signing and completing this review will prevent further changes." The dialog has two buttons: "OK" (highlighted with a red square) and "Cancel". To the right of the dialog, there are icons for "back", "print", and "help". Below the dialog, the main content area is titled "Sign & Complete" and includes a green "Sign & Complete" button. The text "Send to the next contributor." is visible. A large text box contains the following text: "ATTENTION! If an employee disagrees with any of the information contained in this document, he or she can submit a written statement explaining his or her position, which will be maintained as part of his or her employee personnel file. Acknowledgement I have reviewed this document. My signature indicates that I have been advised of my performance status." Below this is a "Final Comments" section with a large empty text area and a mouse cursor icon.

# Review is signed by Employee and in their record

- Reviews can be accessed by employees under Myself > Jobs > Reviews

←  **Karen M Palmer**  
Oneida Nation Enterprises LLC

## Review Summary

← |  |  | >  
back | print full review | help

**Annual Review Test**  
**Karen M Palmer**, HRIS ANLST [Employee Notes](#)  
Effective Date 09/15/2022

Complete all requested information.

### Contributors

Tanya A Davis → Karyn J Chase → Karen M Palmer

### Review sections

	Manager Rating	
Competencies	4.63 - Highly Effective	<a href="#">View</a>
Overall Comments	N/A	<a href="#">View</a>
Final Score	4.63 - Highly Effective	

### Sign & Complete

Send to the next contributor. [Sign & Complete](#)

Acknowledgement

If an employee disagrees with any of the information contained in this document, he or she can submit a written statement explaining his or her position, which will be maintained as part of his or her employee personnel file. I have reviewed this document. My signature indicates that I have been advised of my performance status.

**Karen M Palmer** 09/16/2022 1:56 PM Final Comments



# Manager I Inbox Access

← Inbox

## Requests


 |   >  
edit labels | print | help

### Requests

To do ▾

Find by  From  To   [+] [-]

Filtered by Initiated date range is between 09/09/2022 and 09/16/2022 [\[Clear Filters\]](#) Displaying all records

Initiated	Type	Description	Priority ↑	For	By	Approval	Status	Update	
<a href="#">09/15/2022 10:02:23 AM</a>	Employee	Annual Review Test	Normal	Karen M Palmer	Tanya A Davis	Manager Acknowledgement	Incomplete	<a href="#">Edit</a>	



# Clicking Edit from Inbox – Manager I can Sign

← Inbox

## Review Summary

edit labels | back | print full review | help

**Annual Review Test**  
Karen M Palmer, HRIS ANLST [Employee Notes](#)  
Effective Date 09/15/2022

Complete all requested information.

### Contributors

Tanya A Davis → Karyn J Chase → Karen M Palmer

### Review sections

	Manager Rating	
✔ Competencies Completed	4.63 - Highly Effective	<a href="#">View</a>
Overall Comments	N/A	<a href="#">View</a>
Final Score	4.63 - Highly Effective	

### Sign & Complete

Send to the next contributor.

[Sign & Complete](#)

Acknowledgement

If an employee disagrees with any of the information contained in this document, he or she can submit a written statement explaining his or her position, which will be maintained as part of his or her employee personnel file.  
I have reviewed this document. My signature indicates that I have been advised of my performance status.

**Karen M Palmer** 09/16/2022 1:56 PM Final Comments

Acknowledgement

I have reviewed this document with my employee.

Manager Signing and Completing means they are acknowledging they have reviewed the document with their employee.



# Manager I clicking OK is signing the review making it final

← **Inbox**

Are you sure you want to Sign & Complete this review?  
Signing and completing this review will prevent further changes.

**OK** Cancel

edit labels | back | print full review | help

## Review Summary

**Annual Review Test**  
Karen M Palmer, HRIS ANLST [Employee Notes](#)  
Effective Date 09/15/2022

Complete all requested information.

### Contributors

Tanya A Davis → Karyn J Chase → Karen M Palmer

### Review sections

	Manager Rating	
✓ Competencies Completed	4.63 - Highly Effective	<a href="#">View</a>
Overall Comments	N/A	<a href="#">View</a>
Final Score	4.63 - Highly Effective	

### Sign & Complete

Send to the next contributor. [Sign & Complete](#)

**Acknowledgement**

If an employee disagrees with any of the information contained in this document, he or she can submit a written statement explaining his or her position, which will be maintained as part of his or her employee personnel file.  
I have reviewed this document. My signature indicates that I have been advised of my performance status.

**Karen M Palmer** 09/16/2022 1:56 PM Final Comments


**Acknowledgement**





I have reviewed this document with my employee.




# Final Review

- Manager can access final review under My Team > click employee name > Jobs > Reviews > Review History

←  **Karen M Palmer**  
Oneida Nation Enterprises LLC

**Review Summary**  |  |  |  >

[edit labels](#) | [back](#) | [print full review](#) | [help](#)

**Annual Review Test**  
**Karen M Palmer**, HRIS ANLST  [Employee Notes](#)  
Effective Date 09/15/2022

Complete all requested information.

**Contributors**

Tanya A Davis → Karyn J Chase → Karen M Palmer

**Review sections**

	Manager Rating	
Competencies	4.63 - Highly Effective	<a href="#">View</a>
Overall Comments	N/A	<a href="#">View</a>
Final Score	4.63 - Highly Effective	

**Sign & Complete**

Send to the next contributor. [Sign & Complete](#)

**Acknowledgement**

If an employee disagrees with any of the information contained in this document, he or she can submit a written statement explaining his or her position, which will be maintained as part of his or her employee personnel file. I have reviewed this document. My signature indicates that I have been advised of my performance status.

**Karen M Palmer** 09/16/2022 1:56 PM Final Comments

**Acknowledgement**

I have reviewed this document with my employee.

**Tanya A Davis** 09/16/2022 2:42 PM Final Comments

