



for admins

Year-end Data Review

Performance Excellence Job Aid

This job aid is for Performance Excellence Administrators, and describes how to review and sort report data for your department, school or unit at the end of the performance year, and encourage appropriate action to close-out reviews.

Sort Review Status Report

1. Find and open the weekly “review status” report sent from myHR Learn via email.
2. Sort by **Review status** and **Overall Rating level** using [custom lists](#):
 - a. First filter: sort **Review Status** using this list: Activated, Released, Completed
 - b. Second filter: sort **Overall Rating Level** using this list: Achieving, Corrective Action, Development Needed, Excelling, Role Model, Not Rated, (blank)
3. Using this sort, you will find the following four situations, in order:

	Review Status	Overall Rating Level
A	Activated	Rating and comments entered
B	Activated	Rating and comments not entered
C	Released	Rating and comments entered
D	Completed	Rating and comments entered

4. Review the spreadsheet to find and filter out any terminated staff.

Encourage Appropriate Action

For each situation, it is recommended that the administrator prompt the staff member or their supervisor with an email reminder to take appropriate action to ensure data integrity for the past performance year.

	Admin action recommended	Suggested E-mail Text
A	Prompt manager to release, check for staff member finalization	<i>It is important that all staff have an opportunity to view their performance review and rating. We have</i>

		<i>noticed that not all of your reviews for 2017-18 were released to staff. Please open your team member's reviews for Performance Year 2017-18 in myHR Learn, confirm your rating and comments are complete, scroll to the bottom, and select RELEASE TO STAFF.</i>
B	Prompt manager to enter and release, check for staff member finalization	<i>It is important that all ratings and comments are recorded in myHR Learn, and that staff have an opportunity to view. We have noticed that not all of your ratings and reviews for 2017-18 were entered or released to staff. Please open your team member's reviews for Performance Year 2017-18 in myHR Learn, confirm your rating and comments are complete, scroll to the bottom, and select RELEASE TO STAFF.</i>
C	Prompt staff member to finalize	<i>It is important that all Performance Reviews are viewed and finalized by staff members. We have noticed that your Performance Review from 2017-18 is not yet finalized. Please open last year's performance review in myHR Learn and finalize by checking the box indicating you have read the review.</i>
D	No action needed	

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Help: For policy and process questions, contact your unit's HR Administrator. For technical support: 847-491-4357 (1-HELP) or consultant@northwestern.edu