



for admins

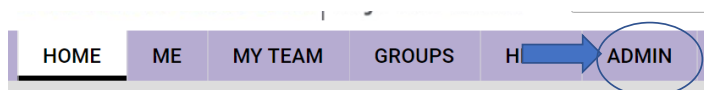
## Create a Review

### Performance Excellence Job Aid

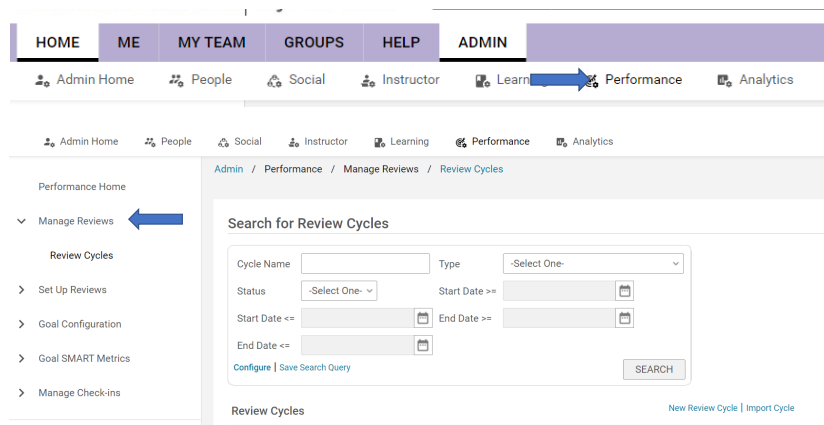
This job aid is for Performance Excellence Administrators, and shows how to create a performance review when one has not been assigned. *Note: new staff are automatically assigned a performance review within a week of being added to myHR. Staff with a start date on May 1 or later will not be assigned a review for the current performance year, and will be assigned one for the subsequent performance year.*

Login to myHR Learn at [learn.northwestern.edu](https://learn.northwestern.edu)

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



2. Click on **PERFORMANCE** (on sub-menu) and then **MANAGE REVIEWS**.



3. You will now see “Search for Review Cycles.” In the “Cycle Name” field, enter the current calendar year and click SEARCH.

#### Search for Review Cycles

Cycle Name  Type

Status  Start Date >=

Start Date <=  End Date >=

End Date <=

[Configure](#) | [Save Search Query](#)

- Find the current review cycle (based on Performance Year) and click the link to the right that says **MONITOR REVIEWS**.

*Note: the next page often takes a long time to load.*

Configure   Save Search Query									
SEARCH									
Review Cycles									
New Review Cycle   Import Cycle   Print   Export   Modify Table									
Cycle Name	Type	Status	Start Date	End Date	Domain	Activation Date	Created By	Sub Type	Actions
2021-2022 Performance Year	Focal	Activated	01-JUN-2021	31-MAY-2022	Northwestern	08-DEC-2021	Default Review Owner	Annual	<a href="#">Monitor Reviews</a> <a href="#">Export Cycle</a> <a href="#">Copy</a>

- You will then come to a page that says Monitor Review Cycle:[20XX-20XX Performance Year] Click the link that says **CREATE REVIEWS**

### Monitor Review Cycle: 2021-2022 Performance Year

Name	2021-2022 Performance Year		
Status	Activated		
Total Reviews	793	<a href="#">Create Reviews</a>	<a href="#">Create Bulk Reviews</a>
<a href="#">Calibrate Reviews</a>   <a href="#">Chart View</a>			
<a href="#">Export to PDF</a>   <a href="#">Print</a>   <a href="#">Export</a>			

### Review Summary

- A pop-up will appear. Select the performance year cycle for which you are creating the new review form. Search for the staff member by last name (recommended) or first and last name. Check the box next the staff member's name, and click **SELECT**.

myHR Learn - Google Chrome

learn.northwestern.edu/Saba/Web\_wdk/PRODTNT074Admin/performance/review/pick\_r...

### Select Review Form

1.Select Review Form ...> 2.Select People

[Print](#) | [Export](#)

Select	Name
<input type="checkbox"/>	Annual Performance Excellence 2021-2022

[CANCEL](#)

Population*	Internal	Person ID	
Username		Manager	
First Name	saba	Last Name	test
Organization		Location	
Domain		Role	
Person Type	-Select One-	Include All Suborganizations	<input type="checkbox"/>

[SE](#)

### People

	First Name	Last Name	Username	Person ID	Organization	Location	Mi
<input type="checkbox"/>	Saba	Test1	SABATEST1	321224	044500 - Office of Human Resources	Evanston	W
<input type="checkbox"/>	Saba	Test2	SABATEST2	1234321	044500 - Office of Human Resources	Evanston	ES
<input type="checkbox"/>	Saba	Test4	SABATEST4	123321	044500 - Office of Human Resources	Evanston	ES
<input checked="" type="checkbox"/>	Saba	Test5	SABATEST5	3732279867	044500 - Office of Human Resources	Evanston	ES

<<PREVIOUS [SELECT](#)

7. The pop-up will disappear, and you will be back on the “Monitor Review Cycle” page. In a few minutes (please be patient), the review will be automatically created.

8. To Verify if a review has been created, access the reviews through the Admin Panel and find the review in question and click View Details\*.  
\*Reference the [Admin- Access a Review job aid](#) for help on accessing a performance review.

#### Monitor Review Cycle: 2021-2022 Performance Year

Name 2021-2022 Performance Year  
Status Activated  
Total Reviews 7938 [Create Reviews](#) [Create Bulk Reviews](#)

[Calibrate Reviews](#) | [Chart View](#)

[Export to PDF](#) | [Print](#) | [Export](#)

#### Review Summary

Search: Performance Reviews

Review Name

Review Owner

Reviewee

SABATEST2

Review Status

-Select One-

Start Date From >=

End Date To <=

Reviewee's Organization

Include All Suborganizations

☐

Review Form

Terminated After

Terminated Before

[Configure](#) | [Save Search Query](#)

SEARCH

Reviews

[Print](#) | [Export](#) | [Modify Table](#)

<input type="checkbox"/>	Review Name	Reviewee	Person Type	Review Owner	Review Status	Reviewer Status	Start Date From	End Date To	Overall Rating
<input type="checkbox"/>	2019-2020 Performance Year	Saba Test2	Staff		Activated	0 of 2 Completed	01-JUN-2019	31-MAY-2020	Not Available
<input type="checkbox"/>	2020-2021 Performance Year	Saba Test2	Staff		Activated	0 of 2 Completed	01-JUN-2020	31-MAY-2021	Not Available
<input type="checkbox"/>	2021-2022 Performance Year	Saba Test2	Staff		Activated	0 of 2 Completed	01-JUN-2021	31-MAY-2022	Not Available
<input type="checkbox"/>	Performance Year 2018-2019	Saba Test2	Staff		Activated	0 of 2 Completed	01-MAY-2018	30-APR-2019	Not Available

Ready to login? [learn.northwestern.edu](https://learn.northwestern.edu) Access additional tools and resources: [perform.northwestern.edu](https://perform.northwestern.edu)

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