Task Administration

CLICK
to create a new
Performance Review Task
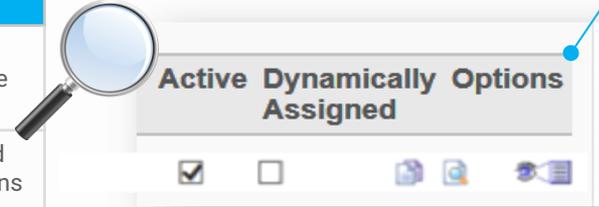

Option	Description
Active	Activate or deactivate a task by selecting the Active option next to the task. Inactive tasks are not implemented. Any modifications to the Active options are not saved until the Save button is clicked.
Dynamically Assigned	If a task is dynamically assigned, it is assigned to users who meet the specified criteria. If a user leaves the OU, they can no longer access the task. If a user joins the OU during the Task Period, they are automatically assigned the task. Any modifications to the Dynamically Assigned options are not saved until the Save button is clicked.
Copy	Click this option to copy the performance review task.
View Settings	Click this option to view the settings of the in progress performance review task.
Edit	Editing is dependent on the status of the performance review task (some status' allow for full, partial or no edit).
Add Users	Click this option to add users to the performance review task. The Add User icon is only available for tasks that are still within the assignment period. Adding users is a multi-step process that may take up to 24 hours. To verify that the users have been successfully added to the task, click the View Details icon to open the task details page.
View Task Details	Click this option to view the details of the performance review task.
Delete	Click this option to delete the performance review task. This option is only available for tasks that have not yet begun.

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General Page

Define Performance Review Task

General

- General
- Review Workflow
- Review Summary
- Visibility
- Confirm

Task Name: Annual Performance Review for Employees
Description: Please refer to all approved material for review procedures.

ENTER Title (100 character limit)

ENTER Description (500 character limit)

Instructions:

B *I* U

evaluate your performance over the past year, with the overall goal of using this information to help set goals and individual development plans for the forthcoming year.

Please note the scale below as it will be referenced throughout this review:
1= Expectations not met; Unacceptable
2 = Some expectations met (meets threshold
3 = Consistently meets expectations; Solid, value-added performance (meets target)
4 = Consistently exceeds expectations (meets maximum goal)
5 = Far exceeds expectations; Exceptional results

Design HTML

Task Type: Standard
Category: Manager

ENTER Instructions (3000 character limit)

SELECT Standard Task or Off Cycle Task
(Off Cycle: task will not have a static assignment date)

SELECT review task category to associate
(optional)

Date Criteria

DATE CRITERIA

When can the review task be assigned (Task Period)?
From: 11/15/2016 To: 12/30/2016

When is the entire review due?
○
● 45 Day(s) from when the review is assigned

SELECT From and To fields to define when the system begins and stops assigning review tasks to eligible individuals

SPECIFY when the review is due in its entirety
(fixed date or relative date)

Review Period

REVIEW PERIOD

● From: 1/1/2016 To: 12/31/2016
○ The review period will be based on when the Employee's review is assigned.

SET the period of time for which the employee is being reviewed
(fixed date or relative date)

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Availability

AVAILABILITY

The availability criteria that you select will only include employees who meet the following criteria:
(Operating Unit is or below Quanta Services, Inc. (Parent for all Field OpUs))

Select Criteria ▼

DETERMINE who is assigned the review task; **CLICK** add

Assignment Criteria

ASSIGNMENT CRITERIA

◉ All reviews will be assigned at the beginning of the Task Period.
○ Reviews will be assigned based on each Employee's Select Date Field ▼

DEFINE how the review task is assigned.

Ratings

RATINGS DISPLAY

Display all ratings as: ○ Numeric ○ Text ◉ Both

OVERALL RATING SCALE 📝

Score	Rating	Description
1	Does Not Meet Minimum Expectations	Employee is not meeting minimum expectations in this category.
2	Meets Expectations	Employee meets expectations in this category.
3	Exceeds Expectations	Employee exceeds expectations in this category.

☐ Auto-score Overall Performance Review Scores

CHOOSE how ratings display in the review

CLICK edit icon 📝 to edit the overall rating scale for this particular task

Attachments

ATTACHMENTS

☐ Allow reviewers to attach up to three relevant files to this review.

SELECT to allow attachments

Employee Information

EMPLOYEE INFORMATION ⊕

The employee's full name and position already appear on the review.

🗑 Manager
🗑 Position
🗑 Full Name

CHOOSE how Employee Information appears on the Review

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Review Steps

REVIEW STEPS ⊕

CLICK
to add steps to review

ENTER Title (100 character limit)

Add Review Step

📝 Define Review Step

Step Title: _____ 🌐

Assigned To: [Select ▼]

☐ This step is optional. It will not affect the status of the overall review.

Select
Self
Manager
Subordinates
Co-worker
Colleagues
Internal Customer
Indirect Manager
Dotted Line Manager
HR Generalist
Dotted Line Manager
User

SELECT who is performing the review

Review Sections

SECTIONS ⊕

CLICK
to add sections to review

Title	Version	Rights	Type	Previous Responses	Weight	Options
Total:				0.00%		

Search Review Form Sections:

Name: _____ [All ▼] [All Categories ▼] [🔍 Search]

(8 Results)

Select	Name	Version	Type
☐	Competency Assessment	1.0	Competency Assessment
☐	Competency Section	2.0	Competency Section
☐	Development Plan	1.0	Development Plan
☐	Evidence Collection	1.0	Evidence Collection
☐	Goal Planning	2.0	Goal Planning Section
☐	Goal Rating	3.0	Goal Rating Section
☐	Question List	1.0	Question List
☐	Signatures	3.0	Sign Off Section

SELECT which sections the reviewer needs to complete during the review. The sections that appear are sections that have been previously created.

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The sequence and weight of the step, when the step is due, and how the step can be submitted is determined here.

Option	Description
Sequence	Determines the order in which the reviewers complete the performance review. Enter a sequence number for the steps. If a sequence is entered, then the tasks for each step is not be sent to that reviewer until the reviewer who was immediately before them in the sequence has submitted their review.
Weight	Determines how the weight of the ratings in each section fits into the overall calculation of the review ratings. If a step's weight is set to 0%, the step is essentially used for informational purposes, and the scores in that step have no impact on the overall review rating. The total of all step weights must be 100%.
Assignees	Displays to whom the step is assigned.
Due Date	Date by which the review step must be completed. This is specified by clicking the Define Date Criteria icon
Date Options	Displays any date options that are set for the step.
Sections	Displays the number of sections contained in the step. Click the View link next to this value to open a pop-up that displays the title of the step and for each section within the step, the title, version, and type are displayed. Each step must have at least one section.
Allow Manager to Reopen Previous Steps	Selecting this option allows the manager to reopen previous steps

Define Performance Review Task

🔖 Review Summary

OFF-CYCLE SUMMARY

☐ Include a summary table pop up of selected off-cycle task(s). A link to the table will be displayed in the Options drop down.

REVIEW SUMMARY

Select from one of the following review summary options to display on the performance review. The selected option will apply to all users in the review.
The Summary page will be the last section by default. If the Sign-off section is configured last, the Summary page will be placed before the Sign-off page.

Summary Options: [Ratings Summary ▼]

Overall Rating:
○ Numeric Rating
● Text Rating

☑ Display Rating Scale

Steps to include:
☑ Manager Review (100.00%)

☑ Display Weights on Review Summary

CONFIRMATION PAGE

☐ Display a Confirmation Page once a user has completed their step.

BATCH RATING

☐ Allow reviewers to batch rate for this review.

ADDITIONAL OPTIONS

Task List Name for Manager: [Complete Year-End Supervisor Review of EMPLOYEE.FIRST.NAME EMPLOYEE.LAST.NAI] 🌐

☑ Include comment assistant in Performance Review
☑ Allow Co-Planners (allows manager, indirect manager, and custom relationships to add co-planners)
● Reveal Peer Reviewer names only to the Manager, Indirect Manager, and custom relationships, but not to any other reviewer or to the reviewee
○ Refer to Peer Reviewers as Anonymous to all reviewers
☐ Include Position Description in Performance Review
☑ Include option to view Feedback in Performance Review
☐ For In Progress steps, commit Section and Step Scores to Reporting on Save by reviewers

SELECT Summary options

CHOOSE to display confirmation page

SELECT to allow batch ratings
(can only be used to provide ratings for Competency Rating and Question List performance review sections)

CHOOSE additional options

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Define Performance Review Task

📝 **Visibility**

Specify which sections of the review are visible to the Reviewee and when each section should become visible for each Reviewee. By default, all sections are visible and will be visible to the Reviewee upon section completion. To edit a section, click on the Edit icon next to the section. If the Reviewee is the only assignee in the task, then no visibility options can be defined.

OVERALL TASK VISIBILITY

☑ Overall task visible to employee from their main performance reviews page.

MANAGER

Section Title	Version	Visible to Reviewee	Display Options	Date Visible To Reviewee	Options
True Value Competencies (Qualitative Results)	1.0	☑	☑ Rating ☑ Comments	Upon Completion	📝 📝
Competency Section	1.0	☑	☑ Rating ☑ Comments	Upon Completion	📝

OVERALL RATING

○ Visible upon completion
○ Visible [   ] Day(s) after [Manager Review ▼]
○ Visible on [   ] 📅
○ Never visible

[« Back] [Cancel] [Next »]

SELECT Summary options

Define Performance Review Task

📝 **Confirm**

Task Title: Annual Performance Review for Employees
Description: Please refer to all approved material for review procedures.
Assignment Period: 11/15/2016 - 12/30/2016
Expiration Date: 45 Day(s)
Assignment: at start of task period
Choe, Jennifer
Vujovic, Daniel
Availability: Monroe, Nik
Matthews, Chloe
Pauley, Lindsey
Review Period Start Date: 1/1/2016
Review Period Duration: 1/1/2016 - 12/31/2016

CONFIRM

REVIEW PROCESS

Manager Review
Due: 45 days after start
Assigned To: Manager

Preview

True Value Competencies (Qualitative Results) (1.0)

Competency Section (1.0)

Save

SAVE review task

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