



UKG – PLAN

Training Guide -
Managers

2021

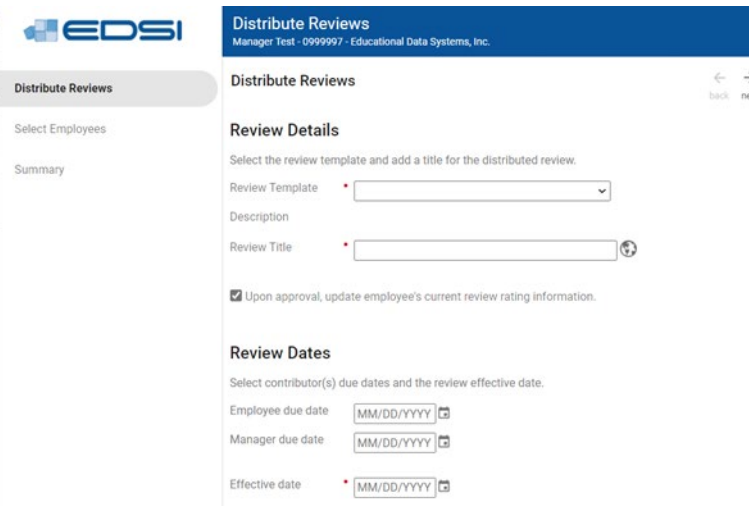
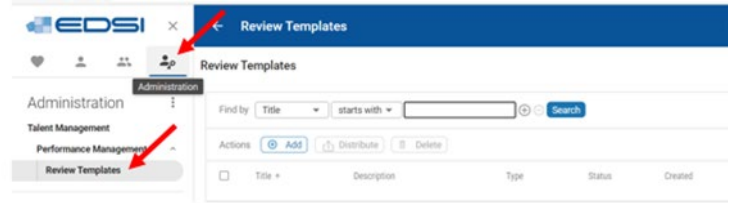


Table of Contents

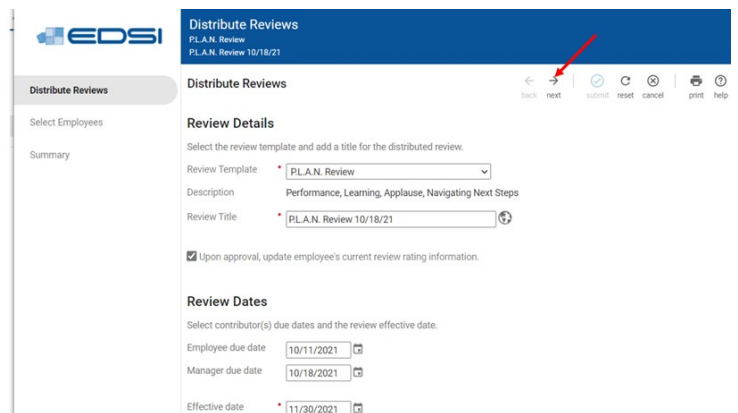
SECTION 1: ASSIGNING NEW REVIEW.....	3
SECTION 2: DISTRIBUTE NEW REVIEW.....	6
SECTION 3: COMPLETE REVIEW.....	7
SECTION 4: SEND REVIEW BACK TO EMPLOYEE FOR CHANGES.....	10
SECTION 5: SEND TO EMPLOYEE TO SIGN AND COMPLETE.....	11
SECTION 6: SIGN AND COMPLETE REVIEW.....	12
SECTION 7: STATUS OF REVIEW COMPLETED.....	13

SECTION 1: ASSIGNING NEW REVIEW

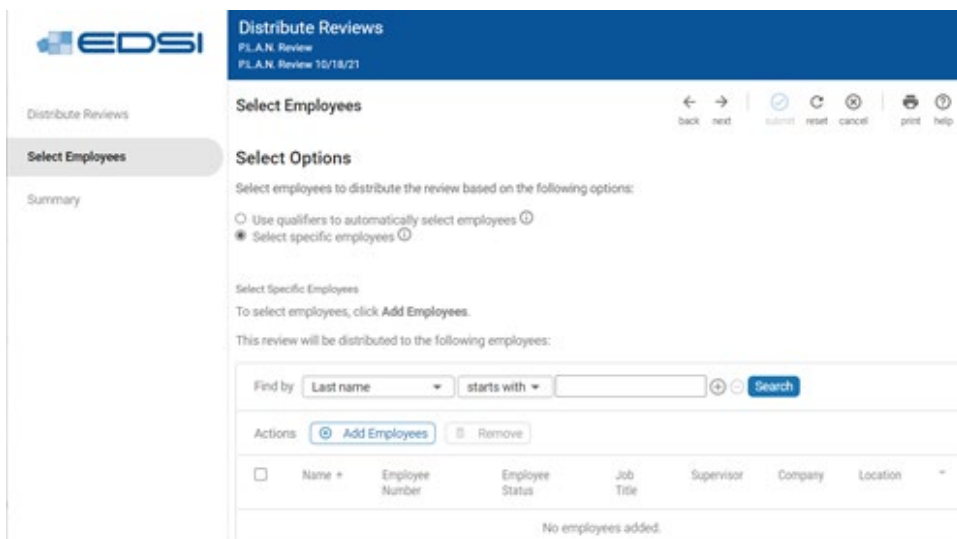
- Select **Administration** menu
 - Select **Review** Template
 - Select **Distribute** Reviews
- Select your office-specific P.L.A.N. from the **Review Template** drop down
 - Add **Review Title**
 - Note:** For review title, please use Review Template name and due date
 - Select **Employee due date** from calendar
 - Select **Manager due date** from calendar
 - Select **Effective date** (The Effective date is the last date this review is effective for that quarter)



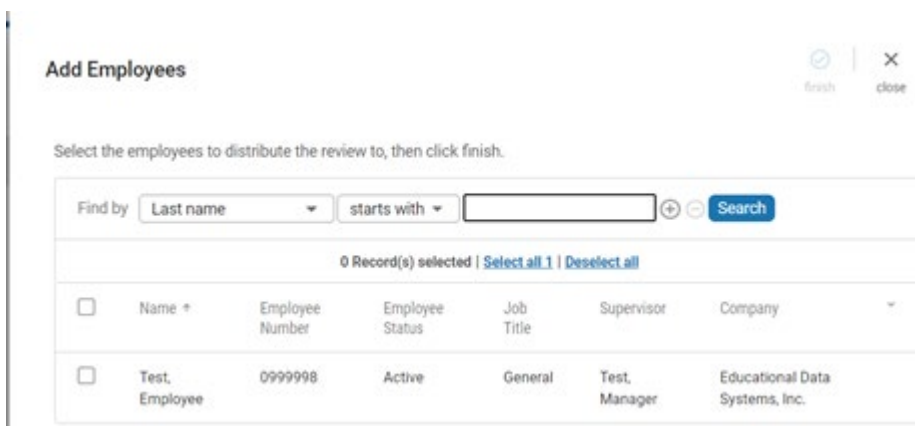
- Select **next**



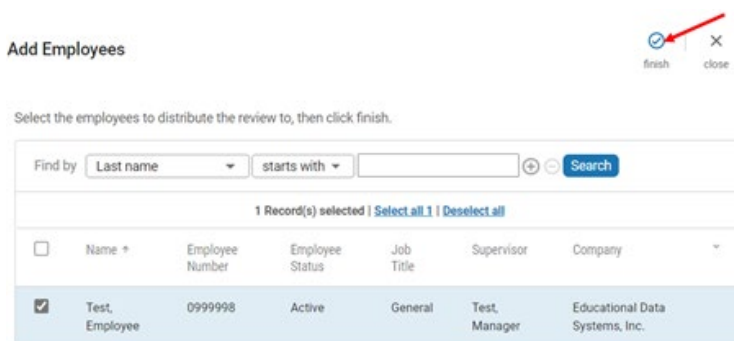
4.
 - Select **Select specific employees**
 - Select **Add Employees** button



5.
 - If you do not see employee(s), use Search function



6.
 - Once you have employee(s) who you assign a new review for, select Name or Select all and then select **finish**



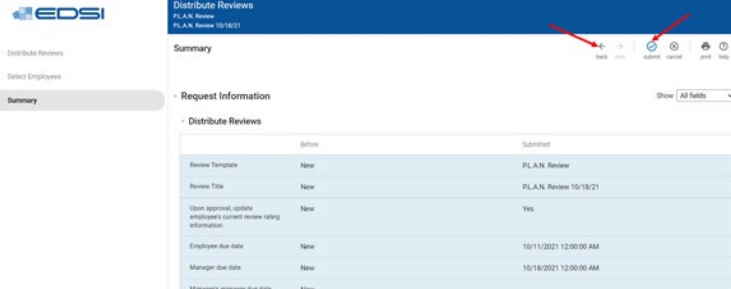
- 7.
- You are back to “**Select Employees**” form.
 - Select *next*

The screenshot shows the EDSI 'Distribute Reviews' interface. The page title is 'Distribute Reviews' with a sub-header 'FLA.N. Review' and a date 'FLA.N. Review 10/18/21'. The main content area is titled 'Select Employees' and includes a navigation bar with buttons for 'back', 'next', 'cancel', 'print', and 'help'. A red arrow points to the 'next' button. Below the navigation bar, there is a 'Select Options' section with two radio buttons: 'Use qualifiers to automatically select employees' (unselected) and 'Select specific employees' (selected). Underneath, there is a 'Select Specific Employees' section with instructions to click 'Add Employees'. A search bar is present with 'Find by' set to 'Last name' and 'starts with' set to an empty field. Below the search bar are 'Add Employees' and 'Remove' buttons. At the bottom, there is a table with columns: Name, Employee Number, Employee Status, Job Title, Supervisor, Company, and Location. One employee is listed and selected with a checkbox.

	Name +	Employee Number	Employee Status	Job Title	Supervisor	Company	Location
<input checked="" type="checkbox"/>	Test, Employee	0999998	Active	General	Test, Manager	Educational Data Systems, Inc.	Corporate Office

SECTION 2: DISTRIBUTE NEW REVIEW

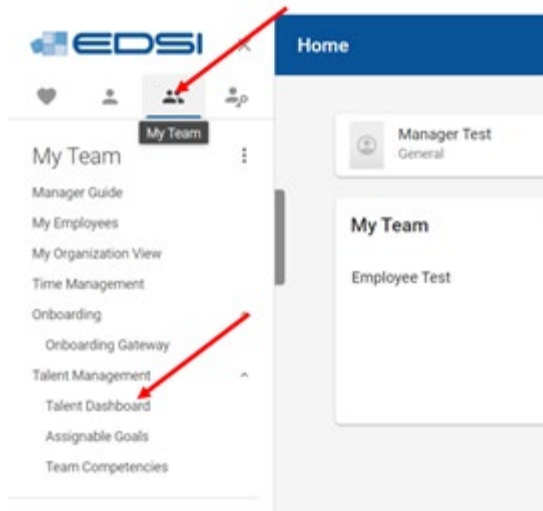
1.
 - Review the information you entered. If you need to edit it, select back
 - If everything is correct, select **submit**
 - Once you submit review, your employee receives email that Employee Assessment task is available to evaluate and complete



SECTION 3: COMPLETE REVIEW

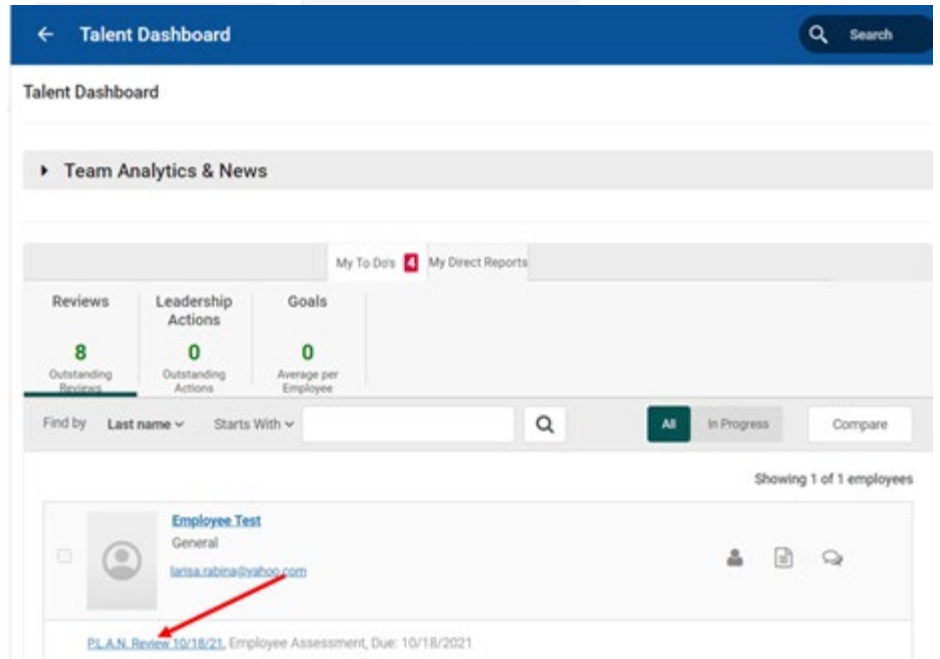
1.

- Open **My Team** menu and then select **Talent Dashboard**



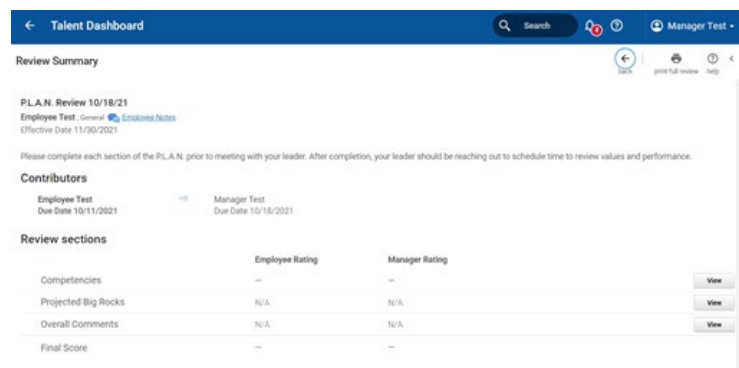
2.

- Talent Dashboard page opens.
- Select review



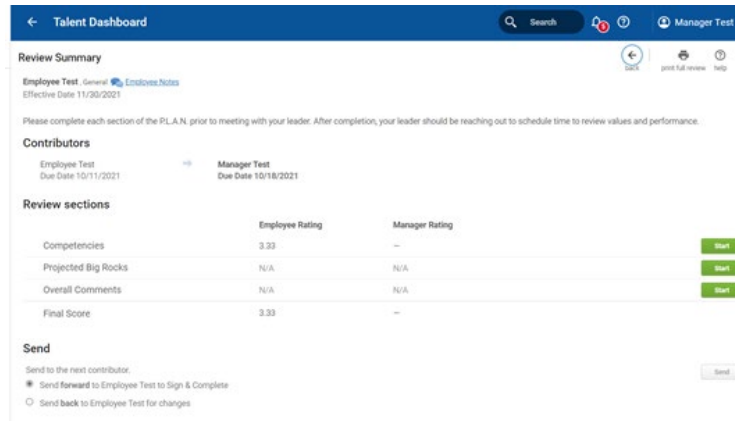
3.

- The status of review is Employee Assessment. It is available for your **View only**



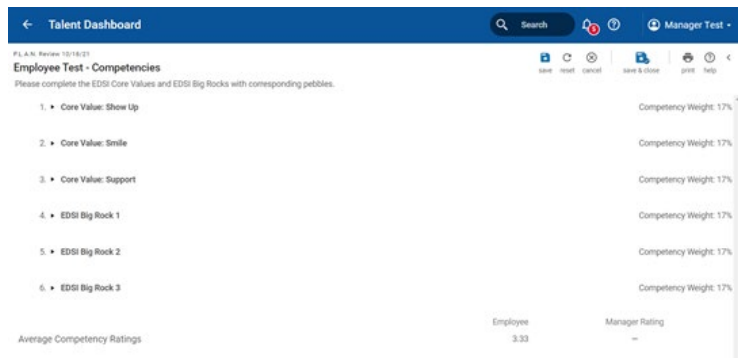
4.

- Once your employee completes Employee Assessment, you will get a notification that the Manager Assessment task is available for you to evaluate and complete and the due date you should complete it by
- Select **Start** to complete each section:



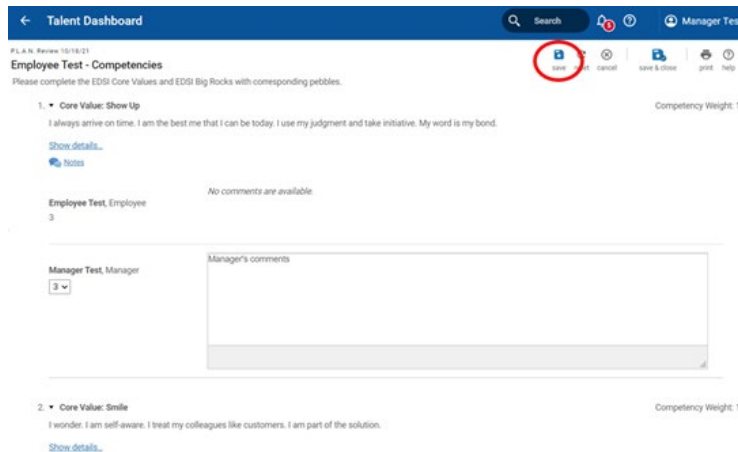
5.

- In the **Competencies** section, you should complete the EDSI Core Values and Big Rocks



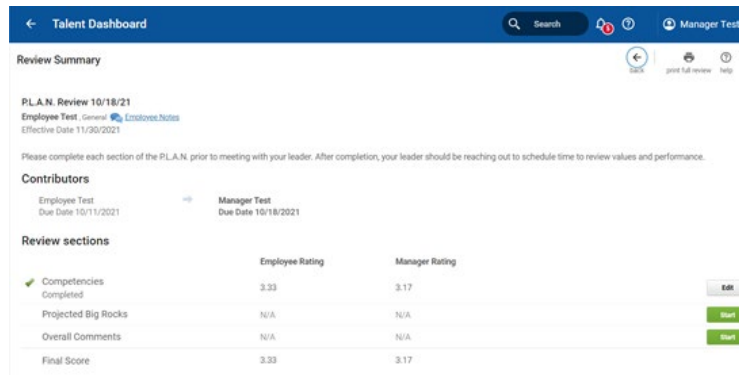
6.

- Rate each task and include your comments. To save information you included, select **save**



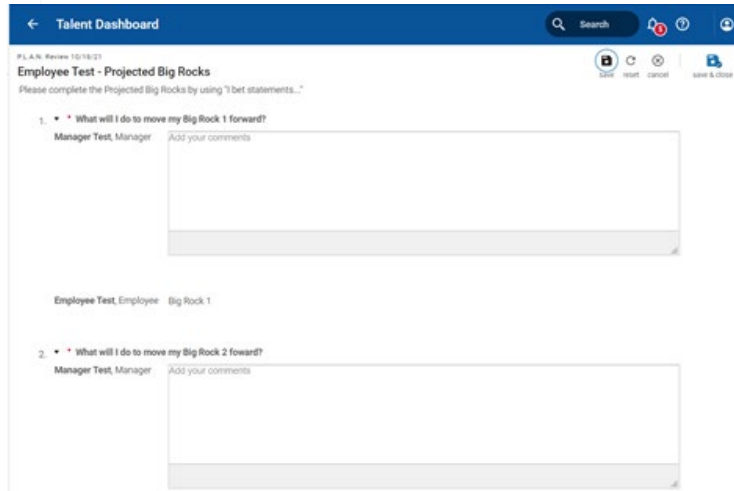
7.

- Once you complete the section, the status is changed to **Completed**



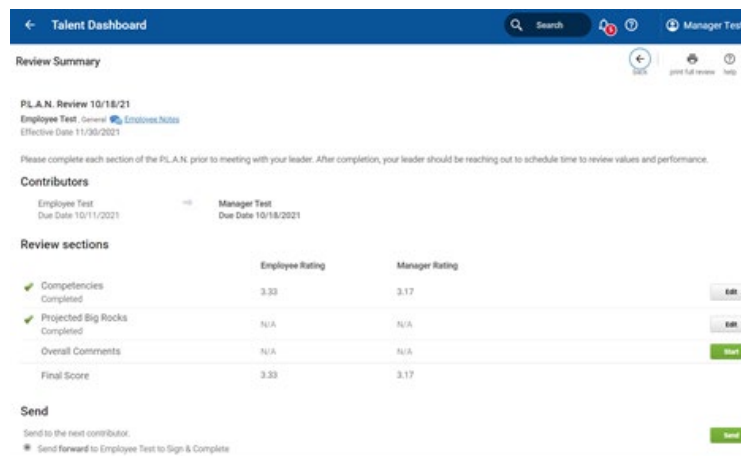
8.

- You should complete Projected Big Rocks section. To open it, select **Start**
- Add your comments and select **save** to save information you entered



9.

- Once you complete the section, the status is changed to **Completed**
- To complete **Overall Comments** section select **Start**
- Once you complete Manager Assessment, you can **send this review back to employee** for changes or **send it to employee to sign and complete it**



SECTION 4: SEND REVIEW BACK TO EMPLOYEE FOR CHANGES

1.

- *Note:* Please discuss with your employee about updates you expect
- Select **Send** review back to Employee for changes and then select **Send**

Talent Dashboard

Review Summary

PL.A.N. Review 10/18/21
Employee Test, General [Employee Notes](#)
Effective Date 11/30/2021

Please complete each section of the PL.A.N. prior to meeting with your leader. After completion, your leader should be reaching out to schedule time to review values and performance.

Contributors

Employee Test Due Date 10/11/2021	→	Manager Test Due Date 10/18/2021
--------------------------------------	---	-------------------------------------

Review sections

	Employee Rating	Manager Rating	
✓ Competencies Completed	3.33	3.17	Edit
✓ Projected Big Rocks Completed	N/A	N/A	Edit
Overall Comments	N/A	N/A	Edit
Final Score	3.33	3.17	

Send

Send to the next contributor

- Send back to Employee Test to Sign & Complete
- Send back to Employee Test for changes

[Send](#)

2.

- You should *confirm*

Talent Dashboard

Review Summary

ew46.ultipro.com says

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

[OK](#) [Cancel](#)

3.

- Once you select **OK**, email will be sent to your Employee that Employee Assessment task has been reassigned back to employee to complete
- The status of review will be changed to Employee Reassessment. The review will be available for you in View mode only
- When employee completes changes and sends review, you will get notification that the Manager Assessment task is available for you to evaluate and complete

Talent Dashboard

Review Summary

PL.A.N. Review 10/18/21
Employee Test, General [Employee Notes](#)
Effective Date 11/30/2021

Please complete each section of the PL.A.N. prior to meeting with your leader. After completion, your leader should be reaching out to schedule time to review values and performance.

Contributors

Employee Test Due Date 10/11/2021	→	Manager Test Due Date 10/18/2021
--------------------------------------	---	-------------------------------------

Review sections

	Employee Rating	Manager Rating	
Competencies	3.33	3.17	View
Projected Big Rocks	N/A	N/A	View
Overall Comments	N/A	N/A	View
Final Score	3.33	3.17	

SECTION 5: SEND TO EMPLOYEE TO SIGN AND COMPLETE

1.

- Once you complete Manager Assessment and no changes are requested from employee, the next step is to **send this review to employee for signature**
- **Select Send forward to Employee to Sign & Complete** and then **Send**
- The status of Review is changed to Employee Acknowledgement
- Your employee will get notification that the Employee Acknowledgement task is available to evaluate and complete

Talent Dashboard | Search | Manager Test

Review Summary

PLA.N. Review 10/18/21
Employee Test | General | Employee Test
Effective Date 11/30/2021

Please complete each section of the PLA.N. prior to meeting with your leader. After completion, your leader should be reaching out to schedule time to review values and performance.

Contributors

Employee Test	Manager Test
Due Date 10/11/2021	Due Date 10/18/2021

Review sections

	Employee Rating	Manager Rating
✓ Competencies Completed	3.33	3.17
✓ Projected Big Rocks Completed	N/A	N/A
Overall Comments	N/A	N/A
Final Score	3.33	3.17

Send

Send forward to contributor.

Send forward to Employee Test to Sign & Complete

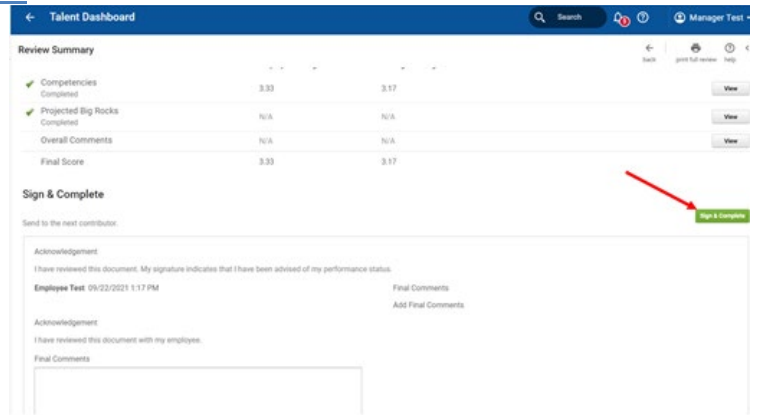
Send back to Employee Test for changes

Send back to Employee Test for changes

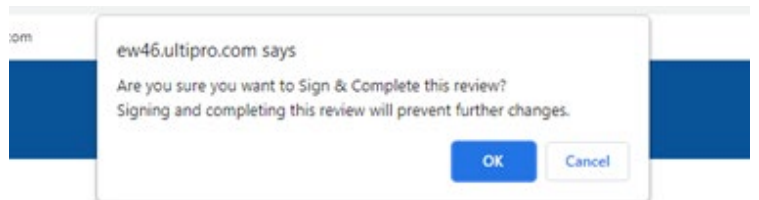
Send

SECTION 6: SIGN AND COMPLETE REVIEW

1.
 - Once your employee signs review, you will get a notification that the Manager Acknowledgement task is available for you to evaluate and complete
 - If you would like to add your comments, use the Final Comments section
 - To sign review, select **Sign & Complete**



2.
 - To finish the process, you should confirm by selecting **OK**



SECTION 7: STATUS OF REVIEW COMPLETED

1.

- To view it, open My Team menu, select Talent Dashboard and then select review

