

# Complete a Probationary Review

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## DESCRIPTION

This guide walks through completing each step in a probationary review in the Learning and Performance system. Probationary reviews are launched by the employee’s manager or agency HR team; for assistance launching a probationary review, please see the *Launch a Probationary Review* guide posted on the LINK User Guide site at [http://das.nebraska.gov/user\\_guides/](http://das.nebraska.gov/user_guides/).

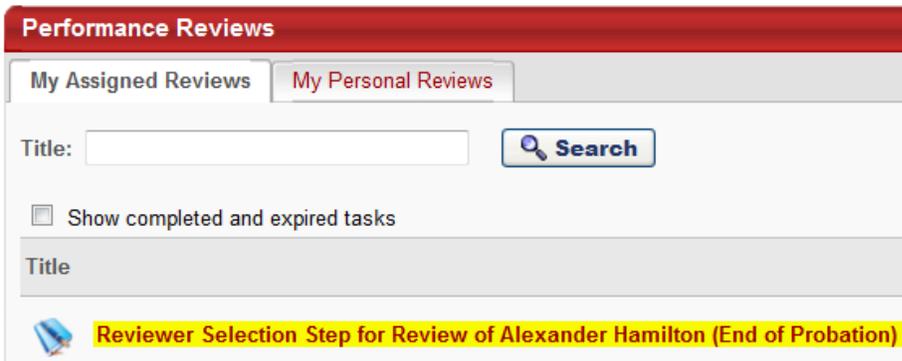
Each step belongs to either the employee, reviewer, or indirect manager, and allows a set number of days for each step to be completed. The whole process can take up to 32 days to complete; if a review expires, it can be reopened by contacting the LINK help desk (the help desk contact information can be found at the end of this guide).

<b>Initial Step</b> <i>(Assigned to Review Creator)</i> <b>Reviewer Selection</b> <i>(For HR Launched Reviews Only)</i> <b>1 day</b>	<b>Step 1</b> <i>(Assigned to Employee)</i> <b>Employee Self-Review</b> <b>5 days</b>	<b>Step 2</b> <i>(Assigned to Manager)</i> <b>Manager Review</b> <b>10 days</b>	<b>Step 3</b> <i>(Assigned to Indirect Manager)</i> <b>Indirect Sign-Off</b> <b>7 days</b>	<b>Step 4</b> <i>(Assigned to Manager)</i> <b>Presentation and Sign-Off</b> <b>7 days</b>	<b>Step 5</b> <i>(Assigned to Employee)</i> <b>Employee Sign-off</b> <b>3 days</b>
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## REVIEWER SELECTION STEP

HR Launched versions of the probationary review require the review creator to select who will be completing the review on the employee. Follow the steps below to complete the Reviewer Selection step:

1. Select **Performance Review Summary** under the **Performance** menu or click the purple **Performance** button on the Welcome Page.
2. This page lists all currently assigned performance review steps – click the **Reviewer Selection Step** to open the evaluation:



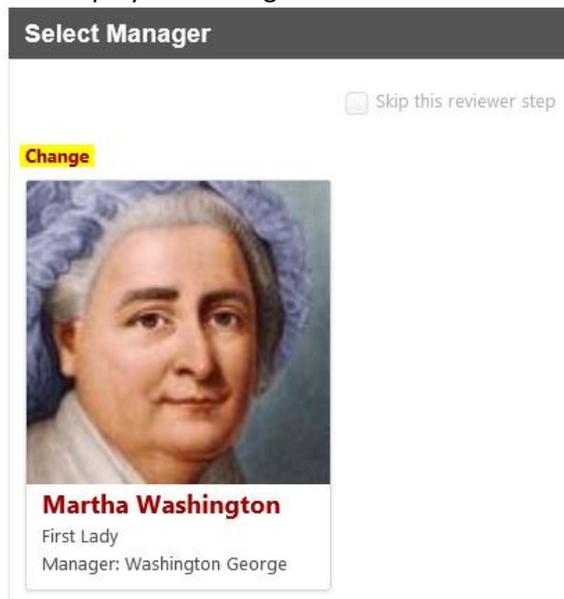
The screenshot shows a web interface titled "Performance Reviews". It has two tabs: "My Assigned Reviews" (active) and "My Personal Reviews". Below the tabs is a search bar with a "Search" button. There is a checkbox labeled "Show completed and expired tasks". Below that is a table with a header "Title". One row is highlighted in yellow: "Reviewer Selection Step for Review of Alexander Hamilton (End of Probation)".

3. The review will open to the Overview page – the only section to complete in this step is the **Reviewer Selection**. Click the **Reviewer Selection** option in the Sections box to the left to jump straight there:



The screenshot shows a navigation sidebar on the left with three items: "Overview" (home icon), "Reviewer Selection" (checkmark icon, highlighted in yellow), and "Summary" (checkmark icon). To the right is a profile card for "Alexander Hamilton", Secretary of Treasury, with dates "1/1/2016 - 6/1/2016" and a portrait of him.

4. The employee's manager is the selected reviewer as default; to choose a new reviewer, click the **Change** link:



The screenshot shows a "Select Manager" dialog box. At the top right is a checkbox labeled "Skip this reviewer step". Below it is a yellow "Change" link. A portrait of Martha Washington is shown. Below the portrait is the text: "Martha Washington", "First Lady", and "Manager: Washington George".

- In the pop-up box search for the employee that will be conducting the review by typing their name and pressing Enter, then clicking their name:

## Select a user

Please search for people by entering keywords using any of the following

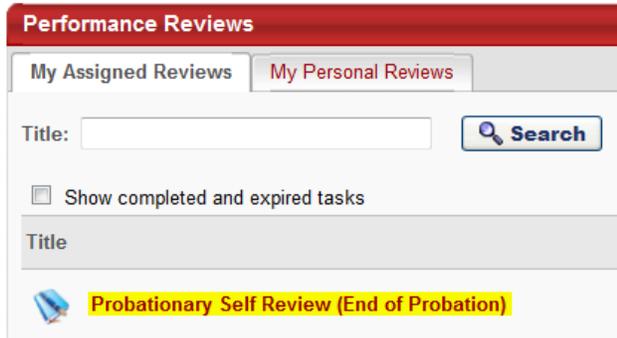
Full Name	Title
 <b>Thomas Jefferson</b>	Secretary of State

- After selecting the reviewer, click the **Submit** button to finish the step – the review will go to the employee being reviewed for the self-review, then move on to the selected reviewer.

## STEP 1 – EMPLOYEE SELF-REVIEW

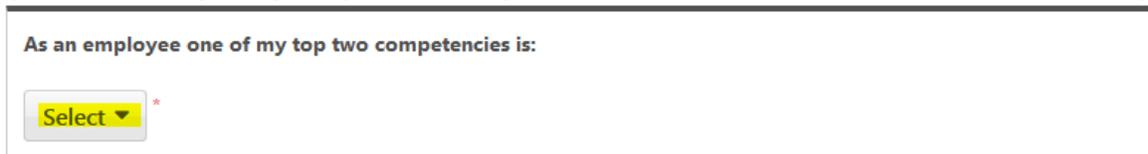
The first step in a probationary review is for the employee to complete the self-review; follow the steps below to complete the employee self-review step:

1. Select **Performance Review Summary** under the **Performance** menu or click the purple **Performance** button on the Welcome Page.
2. This page lists all currently assigned performance review steps – click the **Probationary Self Review** option to open the evaluation (the title of the review will appear in parenthesis):



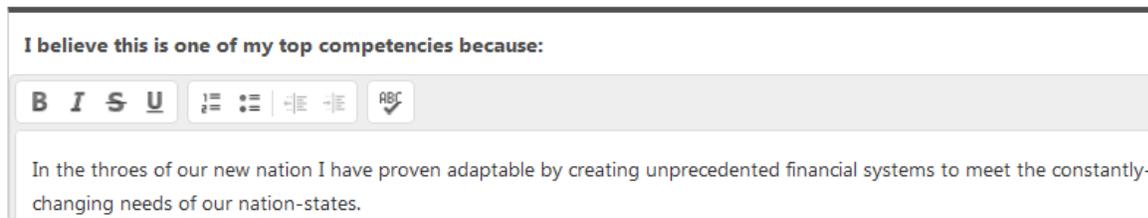
The screenshot shows a web interface titled "Performance Reviews". It has two tabs: "My Assigned Reviews" (active) and "My Personal Reviews". Below the tabs is a search bar with the label "Title:" and a "Search" button. There is a checkbox labeled "Show completed and expired tasks" which is currently unchecked. Below this is a table with a header "Title". The first row in the table contains a blue folder icon and the text "Probationary Self Review (End of Probation)".

3. The review will open to the Overview page – the **Options** button in the upper-right corner can be used to attach files to the review, download a printable PDF copy of the review, and perform other actions. To get started on the self-review, click the red **Get Started** button at the bottom of the page.
4. The Self-Review section consists of a five questions in addition to a few optional comment boxes. The first questions are regarding competencies; to pick an answer, click the **Select** box and choose a competency:



The screenshot shows a question: "As an employee one of my top two competencies is:". Below the question is a dropdown menu with the word "Select" and a downward arrow. A red asterisk is visible to the right of the dropdown menu.

After selecting a competency, enter any comments to support the selection:



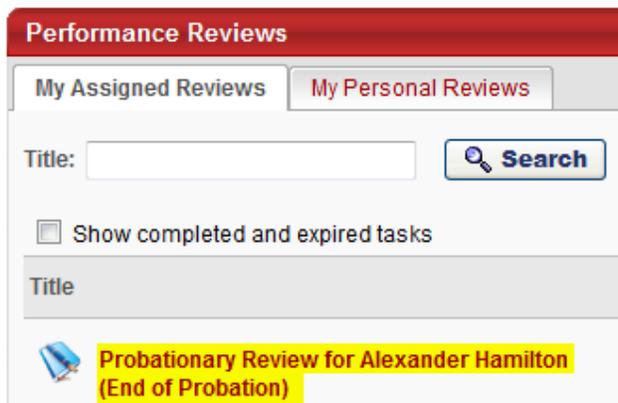
The screenshot shows a question: "I believe this is one of my top competencies because:". Below the question is a rich text editor with a toolbar containing buttons for Bold (B), Italic (I), Strikethrough (ABC), Underline (U), Bulleted List, Numbered List, Indent, and Outdent. Below the toolbar is a text area containing the text: "In the throes of our new nation I have proven adaptable by creating unprecedented financial systems to meet the constantly-changing needs of our nation-states."

5. Complete the remaining questions, which follow the same structure detailed above. Once finished, click the red **Submit** button at the bottom of the page to finish the step and send the evaluation to the reviewer.

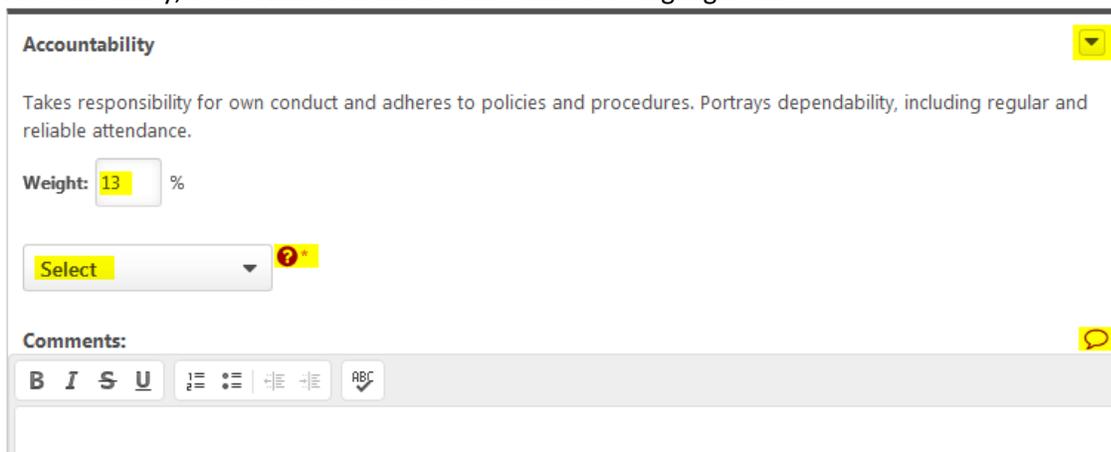
## STEP 2 – MANAGER REVIEW

The second step in the probationary review is for the reviewer (typically the employee’s manager) to complete the evaluation on the employee.

1. Select **Performance Review Summary** under the **Performance** menu or click the purple **Performance** button on the Welcome Page.
2. This page lists all currently assigned performance review steps – click the **Probationary Review for Employee** option to open the evaluation (the title of the review will appear in parenthesis):



3. The review will open to the Overview page. The Options button in the upper-right corner can be used to attach files to the review, download printable PDF copy of the review, add a co-planner, and other actions. The Reopen Step button at the bottom of the page can be used to send the evaluation back to the Self-Review step if needed. To start the Manager Review step, click the red **Get Started** button at the bottom of the page.
4. The first section in the Manager Review step is a review of the employee’s Self-Review step. This section is for review of the employee’s input and there is nothing to rate comment on. To continue to the Competencies section, click the red **Save and Continue** button at the bottom of the page.
5. The Competencies section is where ratings and comments are entered surrounding the employee’s performance in several state-wide competencies; employees who are managers of others will have 12 competencies to rate and employees who are not managers will have 8 competencies. The first competency, Accountability, is shown below with items of interest highlighted:



- The **Action Button** (  ) can be used to view additional details about the specific competency.

- The **Weight** box can be used to set the overall impact this competency will have in the overall score; by default each competency is weighted equally and in most cases does not need to be changed. If changed, all weights must add up to 100%.
- The **Select** box is used to choose a rating for this competency on a 1 through 5 scale, from *Does Not Meet* to *Greatly Exceeds*. An explanation of the ratings can be accessed by clicking the question mark icon (❓) to the right of the Select box.
- The **Comments** box is used to enter comments to support the rating given to the employee. Premade comments are available as a base for your own comments; to view the premade comments, click the speech bubble icon (💬) above the comment box and to the right.

Enter a rating and supporting comments for each competency in this section. Once done, click the red **Save and Continue** button at the bottom of the page to move to the next section, the Goals.

6. The Goals section contains goals that have been set up for the employee, typically by the employee's manager. Goals work similarly to competencies and are rated on a 1 through 5 scale – select a rating for each goal by clicking the **Select** box and enter any comments to support the selected rating (the comment assistant is not available for this section as goals are created manually).
  - **NOTE** – If no goals appear, the employee does not have any active goals during the review period. Goals are not required by all agencies; if omitted, only the competencies will be scored. Goals can be modified and created at any time as outlined in the user guides available at [http://das.nebraska.gov/user\\_guides/](http://das.nebraska.gov/user_guides/).

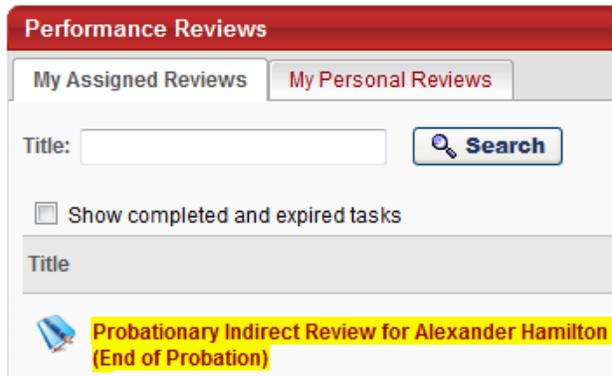
Once rated, click the red **Save and Continue** button to move to the Summary section.

7. The Summary section will show the rating for each section in the review as well as the overall score. A section will display N/A if there is no rating for a particular section; the overall score will only look at sections that display a rating. Click the red **Submit** button to finish the step and send the review to the Indirect Review step.

## STEP 3 – INDIRECT REVIEW

The third step in the probationary review process is for the reviewer's manager to look through the evaluation, sign it, and add any comments if desired. The indirect manager does not enter any ratings on the evaluation.

1. Select **Performance Review Summary** under the **Performance** menu or click the purple **Performance** button on the Welcome Page.
2. This page lists all currently assigned performance review steps – click the **Probationary Indirect Review for Employee** option to open the evaluation (the title of the review will appear in parenthesis):



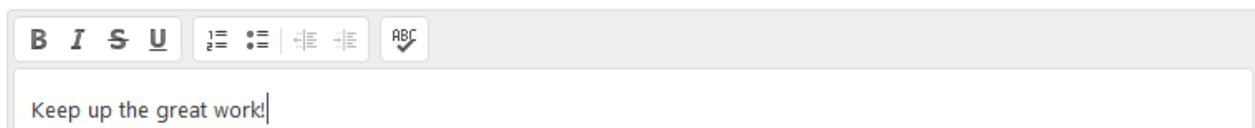
The screenshot shows a web interface titled "Performance Reviews". It has two tabs: "My Assigned Reviews" (selected) and "My Personal Reviews". Below the tabs is a search bar with a "Search" button and a checkbox labeled "Show completed and expired tasks". A table with the header "Title" contains one entry: "Probationary Indirect Review for Alexander Hamilton (End of Probation)", which is highlighted in yellow.

3. The review will open to the Overview page. To review the information entered by the employee in the Self-Review step, click the red **Get Started** button at the bottom of the page.
4. The first section is a review of the employee's Self-Review; this section shows what the employee entered during the Self-Review step. After reviewing the information, click the red **Save and Continue** button at the bottom of the page to continue to the Competencies section.
5. The Competencies section displays ratings and comments entered by the reviewer on the employee's performance in state-wide competencies. Review the ratings and comments, then click the red **Save and Continue** button at the bottom of the page to continue to the Goals section.
6. The Goals section displays the reviewer's ratings and comments on the employee's performance surrounding their goals, which are typically set up by the employee's manager. After reviewing the information, click the red **Save and Continue** button to move to the Summary section.
7. The Summary section shows the rating for each section, as well as the overall review score. If a section does not contain any items to rate, the score will show N/A and will not be included in the overall rating. Click the red **Next** button to move to the Sign-Off section.
8. The Sign-Off section allows the indirect manager to sign the review and enter any comments. Check the box that says "I acknowledge..." then click the red **Sign** button to sign the review:

Indirect Manager

I acknowledge that providing my electronic approval is equivalent to signing this document and I understand that my electronic signature is binding.

**Sign**



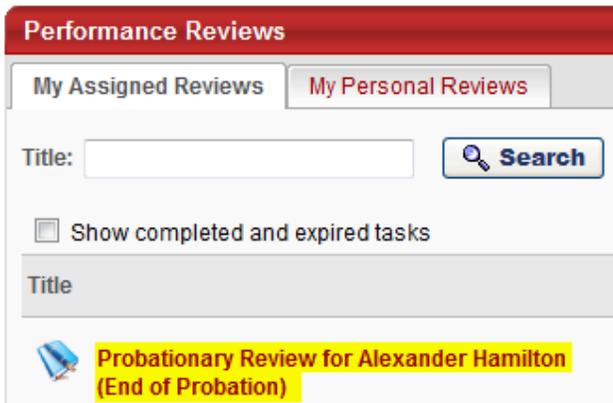
The screenshot shows a rich text editor toolbar with buttons for Bold (B), Italic (I), Strikethrough (S), Underline (U), Bulleted List, Numbered List, Indent, Outdent, and ABC. Below the toolbar is a text input field containing the text "Keep up the great work|".

Comments can be entered below the signature; once done, click the red **Submit** button to finish the step and send it back to the reviewer for the Presentation and Sign-Off step.

## STEP 4 – PRESENTATION AND SIGN-OFF

The fourth step in the probationary review process is for the reviewer to present the evaluation to the employee, enter any comments, and sign it.

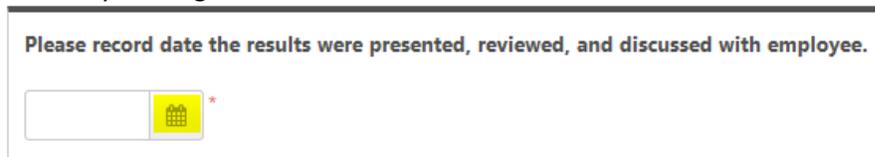
1. Select **Performance Review Summary** under the **Performance** menu or click the purple **Performance** button on the Welcome Page.
2. This page lists all currently assigned performance review steps – click the **Probationary Review for Employee** option to open the evaluation (the title of the review will appear in parenthesis):



3. The review will open to the Overview page. To go over the information entered by the employee in the Self-Review step again, as well as the other steps, click the red **Get Started** button at the bottom of the page. To skip straight to the presentation, click the **Presentation** section in the sections list to the left of the review:



4. The Presentation section is used to document the date the evaluation was presented to the employee. Enter a date by clicking the calendar icon:

A screenshot of the "Presentation" section. It contains a text prompt: "Please record date the results were presented, reviewed, and discussed with employee." Below the prompt is a date input field with a yellow calendar icon and an asterisk.

Click the **Save and Continue** button to the Summary section.

5. The Summary section shows the rating for each section, as well as the overall review score. If a section does not contain any items to rate, the score will show N/A and will not be included in the overall rating. Click the red **Next** button to move to the Sign-Off section.

- The Sign-Off section allows the reviewer to sign the review and add any final comments, as well as review the indirect manager's signature and comments. To sign the review, check the box that says "I acknowledge..." then click the red **Sign** button:

Manager

I acknowledge that providing my electronic approval is equivalent to signing this document and I understand that my electronic signature is binding.

**Sign**

Final comments on the evaluation can be entered below the signatures, however are not required – the indirect manager's comments will show up underneath the comment box:

**B I S U** | | | | |

Thank you for your service.

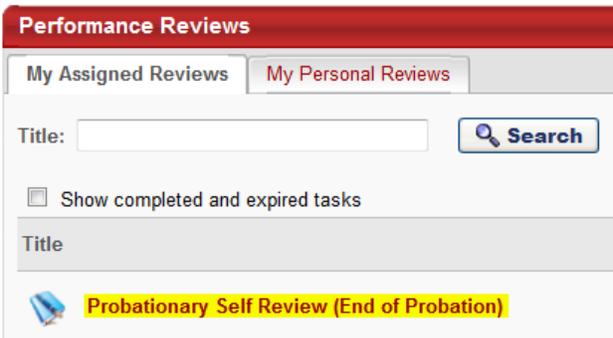
**George Washington** (Indirect Manager) Review: Employee Probationary Review - HR Launched Time: 7/11/2016 3:21 PM  
Keep up the great work!

- Once filled out, click the red **Submit** button to finish the step and send it to the employee for their final signature and comments.

## STEP 5 – EMPLOYEE SIGN-OFF

The final step in the probationary review process is for the employee to go through the review, sign it, and add any final comments if desired.

1. Select **Performance Review Summary** under the **Performance** menu or click the purple **Performance** button on the Welcome Page.
2. This page lists all currently assigned performance review steps – click the **Probationary Self Review** option to open the evaluation (the title of the review will appear in parenthesis):



The screenshot shows a web interface titled "Performance Reviews". It has two tabs: "My Assigned Reviews" (active) and "My Personal Reviews". Below the tabs is a search bar with a "Search" button. There is a checkbox labeled "Show completed and expired tasks". Below that is a table with a header "Title". One row is visible, containing a blue folder icon and the text "Probationary Self Review (End of Probation)", which is highlighted in yellow.

3. The review will open to the Overview page. To review the information entered in the Self-Review step, click the red **Get Started** button at the bottom of the page.
4. After reviewing the Self-Review step, click the red **Save and Continue** button to review the information entered by the reviewer in the Competencies section.
5. The ratings and comments entered by the reviewer in the Competencies section can be reviewed in this section; once done, click the red **Save and Continue** button to move to the Goals section.
6. The Goals section displays the reviewer's ratings and comments surrounding any goals that have been set up for the employee. After reviewing the information, click the red **Save and Continue** button to move to the Presentation section.
7. The Presentation section verifies the date the review was presented to the employee. Click the red **Save and Continue** button to move to the Summary section.
8. The Summary section shows the rating for each section, as well as the overall review score. If a section does not contain any items to rate, the score will show N/A and will not be included in the overall rating. Click the red **Next** button to move to the Sign-Off section.
9. The Sign-Off section shows the reviewer's and indirect manager's signatures – to sign the review, check the box that says "I acknowledge..." then click the red **Sign** button:

Employee

I acknowledge that providing my electronic approval is equivalent to signing this document and I understand that my electronic signature is binding.

**Sign**

10. Final comments can be entered below the signatures, but are not required; the reviewer's and indirect manager's comments can be reviewed below the comment box. Once done, click the red **Submit** button to finish the review.

## **LINK HELP DESK CONTACT INFORMATION**

If you have questions regarding the performance review process or need your logon info, please contact the LINK help desk. The LINK Help Desk provides assistance for the following programs:

- The Employee Work Center
- The Employee Development Center

Email: [as.linkhelp@nebraska.gov](mailto:as.linkhelp@nebraska.gov)

Phone: 402.471.6234