

Launch a Probationary Review

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DESCRIPTION

This document walks through launching a probationary review in the Learning and Performance system.

Probationary reviews can be launched at any time from the Performance Review Summary screen. After the review has been launched an email notification will be sent to the employee, and then the manager and indirect manager will receive email notifications when a review step gets assigned to them.

A manager or HR team member can launch an off-cycle review for an employee at any time. Probationary reviews expire 32 days after being launched.

- **NOTE: The HR Launched versions of reviews first go to the review creator to select a reviewer. Non-HR versions of the review will automatically set the reviewer to the employee's manager.**

Initial Step (HR Only) Reviewer Selection	Step 1 Employee Self-Review	Step 2 Manager Review	Step 3 Indirect Manager Sign-off	Step 4 Manager Presentation And Sign-Off	Step 5 Employee Sign-off
1 day to complete	5 days to complete	10 days to complete	7 days to complete	7 days to complete	3 days to complete

LAUNCHING A PROBATIONARY REVIEW

1. After logging in, click the purple Performance Review button, or choose the **Performance Review Summary** option under the **Performance** menu.



2. Click the **Launch Review** button found towards the top-left of the page to set up a new review.
My Performance Review Summary



3. Choose the employee you wish to review by selecting the **Someone else** radio button and clicking the white **User** box, then select a Review Form by clicking the white **Select Review Form** box.

A screenshot of the 'Performance Review' form. The 'Who is this review for?' section has two radio buttons: 'Me' (unselected) and 'Someone else' (selected). Next to 'Someone else' is a text box containing 'Hamilton, Alexander'. The 'Which review form would you like to use?' section has a dropdown menu showing 'Employee Probationary Review'.

Review form options include the below:

- Employee Probationary Review
 - This form is for employees who are not managers of others. The reviewer is automatically set to the employee's manager.
- Manager Probationary Review
 - This is the form to use for employees who manage other employees. The reviewer is automatically set to the employee's manager.
- Employee/Manager Probationary Review - HR Launched
 - This form is used to launch a review for an employee where the employee's manager is NOT conducting the review. This review first gets assigned to the creator of the review to select who will be completing the employee's review.
- **NOTE: The Manager Probationary Review form will only appear if the employee being reviewed is a manager of other users in the system.**

4. After selecting the review form more options will appear; enter a title and period for the review.

Which review form would you like to use?

Review Title:

Expiration Date: 32 days

What is the review period? From: To:

Employee Probationary Review

Description: This is the performance review form supervisors use to launch probationary reviews managers of others.

Workflow:



- The Review Title is used to give the review a title (such as End of Probation).
- The review period determines what date range is the employee is being reviewed on.

5. Once filled out, click the **Launch** button to start the probationary review.

- **NOTE: Unless the HR Launched version of the form was used, the first step is the employee's self-review – the employee's manager will not see the review immediately after launching.**
- **NOTE: With the HR Launched version of the form, the first step is Reviewer Selection Step for the review creator to choose who will be conducting the review.**

REVIEWER SELECTION STEP

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

1. Select **Performance Review Summary** under the **Performance** menu.
2. This page lists all currently assigned performance review steps – click the review title to open the Reviewer Selection step.
3. The review will open to the **Overview** – the only section to complete is the **Reviewer Selection**. Click the **Reviewer Selection** in the Sections box to the left to jump straight there:



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

Select Manager

Skip this reviewer step

Change



Martha Washington
Job Title
Manager: Washington George

5. 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
 Thomas Jefferson	Job Title

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

LINK HELP DESK CONTACT

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

Phone: 402.471.6234