Creating Review Forms and Review Plans in ADP Workforce Now Performance

Handout Manual

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Course Introduction

Navigating WebEx

Annotation Tools

Chat

Feedback

Full Screen Mode
Course Purpose

This course prepares you to use ADP Workforce Now Performance to create review forms and review plans to prepare for and complete performance reviews.

Your ADP Workforce Now Performance Training

Your Performance training consists of the following courses:

- Introduction to Performance in ADP Workforce Now
- Setting Up and Maintaining ADP Workforce Now Performance
- Preparing for an Annual or a New Hire Review in ADP Workforce Now Performance
- Creating Review Forms and Review Plans in ADP Workforce Now Performance
- Completing an Employee Review in ADP Workforce Now Performance
- Creating PIP Review Forms and Review Plans in ADP Workforce Now Performance
- Creating Disciplinary Forms in ADP Workforce Now Performance

Course Agenda

- Starting the Annual Performance Review Cycle
- Creating Review Forms
- Creating Review Plans
- Using the Performance Dashboard and Review Detail to Manage Reviews Pre- and Postdistribution
- Closing a Performance Review Cycle

TheBridge.adp.com

TheBridge.adp.com is an online community for payroll and HR professionals where you can ask questions, share knowledge, make connections, and learn from industry experts and peers about a broad range of human capital management topics. You can access TheBridge.adp.com to do the following and more:

- Learn how other professionals are getting more from their ADP solutions with time-saving resources and helpful features.
- Join community spaces or topics of interest, including tax, payroll, HR and benefits, and time and labor management.
- Connect with other payroll practitioners, HR professionals, featured industry representatives, and ADP subject matter experts.
- Share your experiences.
- Check the Frequently Asked Questions or ask the community.
Starting the Annual Performance Review Cycle

Overview

ADP Workforce Now Performance simplifies setting up and managing your performance review process by enabling you to do the following:

- Create a review form using a supplied, prepopulated version, or create a custom form based on your organization’s needs.
- Customize review plans.
- Distribute and monitor reviews using an intuitive workflow.
- View performance activity and manage review progress across the organization using a single dashboard.
The Annual Performance Review Cycle Process

Overview
The annual performance review cycle guides you through the process of creating, implementing, and managing annual reviews in your organization.

Stages and Descriptions
The following stages comprise the annual performance review cycle process.

<table>
<thead>
<tr>
<th>Stage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create the review form.</td>
<td>Use a system-provided review form or create a custom review form.</td>
</tr>
<tr>
<td>Create the review plan.</td>
<td>Create review plans for each instance of a review using a system-provided review plan or creating a custom review plan. For example, you can create a review plan for your organization's annual reviews, for which the attributes remain the same from year to year.</td>
</tr>
<tr>
<td>Prepare the review for distribution.</td>
<td>Ensure accuracy and completeness of the review form and plan before distributing to employees. For example, in this stage, you ensure that all employees are assigned a reviewer.</td>
</tr>
<tr>
<td>Distribute the review.</td>
<td>Distribute the review to managers, contributors, and employees.</td>
</tr>
<tr>
<td>Approve the review.</td>
<td>This is an optional stage, which you can choose to enable if your organization requires that performance reviews be approved by someone other than the employees' managers. Note that you need to set up a workflow when reviews require approvals.</td>
</tr>
<tr>
<td>Close the review cycle.</td>
<td>Complete this stage when all performance review activities are completed.</td>
</tr>
</tbody>
</table>

Additional Resources
For more information, refer to The Annual Performance Review Cycle job aid. You can locate this job aid by selecting Process > Talent > Performance Dashboard > Reviews and clicking (learning bytes).
Creating Review Forms

Overview

The first stage in setting up a review is to create the review form. The review form consists of several parts, some of which you can exclude if your organization does not evaluate its employees with questions, goals, or competencies. Managers/reviewers, contributors, if applicable, and employees will use the review form to complete employees' annual reviews.
Activity: Selecting Questions for an Annual Review Form

Scenario

You are preparing for your organization's annual review and need to create a review form that includes questions, employees' goals, and competencies. You plan to use the application-provided annual review form as the basis for your form but want to customize the questions section.
## Instructions

**Starting Point:** Process > Talent > Performance Dashboard > Review Forms > Add New Form

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>In the <strong>Form Name</strong> and <strong>Form Description</strong> fields, enter Annual Review.</td>
</tr>
</tbody>
</table>
| 2    | Remove all but three questions from the list.  
  - Select the questions that you want to remove and click **Remove Questions**. |
| 3    | Select one question from the question bank and add it to the form.  
  - Click **Add Questions**.  
  - Select the question and click **Add to Form**. |
| 4    | Create a question to add to the question bank.  
  - Click **Add Questions**.  
  - Click **Create Question**.  
  - In the **Question Text** field, enter Does the employee act as a mentor to newly hired employees?  
  - Select **Phrase This Question Differently for Employees**.  
  - In the **Question Text** field, enter Do I act as a mentor to newly hired employees?  
  - In the **Category** field, select Teamwork.  
  - In the **Answer Type** field, select Yes/No Buttons.  
  - Make the question Active.  
  - Click Done. |
| 5    | Add the newly created question to the form.  
  - Scroll to the bottom of the question bank to locate the question and select it.  
  - Click **Add to Form**.  
  - **Tip:** To easily locate the question, in the Search field, enter the first few words of the question. |
| 6    | Scroll to the **Additional Form Options** section. |
| 7    | In the **Form Status** field, select Draft. |
| 8    | Click Save. |
Selecting Questions for Review Forms

Overview
When selecting questions for review forms, you can select from the supplied list of questions, add questions from the question bank, or create your own questions. You can also rephrase questions used by the reviewers so that they apply to employees.

Guidelines
- The review form includes the questions that are displayed on the supplied review form unless you remove them.
- When you create questions to add to the form, you can designate them as key performance indicators (KPIs) or make them rated questions.
- You can edit supplied questions by copying them and then editing them.
- Created and edited questions are displayed at the bottom of the question bank list.
- You must select created and edited questions in the question bank in order to add them to the form.

Tip
Use the search feature in the question bank to locate questions to add to the form.
What Is a Key Performance Indicator?

A key performance indicator (KPI) is a type of performance measurement used to evaluate the success of a particular activity in which an organization engages. ADP Workforce Now Performance provides annual and new hire review forms. The question bank includes a list of key performance indicators that you can choose to include in your review forms.

Example

An organization that highly values customer service may evaluate its customer service representatives using key performance indicators like these:

- Creates an environment of continuous improvement and innovation
- Conforms to the highest professional standard
- Seeks to improve all aspects of work performance
- Acts with empathy and focus, while able to resolve problems

Defining Supplied Questions as Key Performance Indicators

You can define supplied questions as key performance indicators by copying the questions and editing them and selecting This Is a Key Performance Indicator on the Create Question page. You can also create your own questions and define them as key performance indicators.
What Are Rated Questions?

Rated questions are questions used on the performance review form that require the reviewer to provide a rating using the provided rating scale. You can create rated questions to use in addition to the supplied rated questions. When using rated questions, you must define the weight that the question carries toward the questions section of the review.

Example

Your review form includes two questions that require a rating when completing employees' performance reviews. Each question's rating counts as 50% of the questions section of the review.

Defining Supplied Questions as Rated Questions

You can define supplied questions as rated questions by copying the questions and editing them and selecting the answer type Rating Scale. You can also create your own questions and define them as rated questions.
Activity: Reordering Questions on a Review Form

Overview
You can reorder the questions in the form so that they are displayed in the order that you prefer.

Scenario
You added some questions from the question bank and created some questions to include in the form. Now you want to reorder the questions to be displayed in the desired order.

Instructions
Click a question in the list and drag it to the desired place in the list.
What Is Managing Competencies?

One of the features available when creating a review form is the ability to manage competencies, including the following:

- Adding competencies or editing existing competencies
- Assigning competencies to job titles that do not have them

Example

Your organization evaluates job competencies as part of the employee performance review. While creating an annual review form, you see that there are job titles without assigned competencies that will be included in the review. You view those job titles and assign competencies to them.

Explore: Competencies

Elements and Descriptions

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Competencies</td>
<td></td>
</tr>
<tr>
<td>View Jobs link</td>
<td></td>
</tr>
</tbody>
</table>

Assigning Competencies to Job Titles

When you create or edit job competencies by way of the review form, you can assign those competencies to all jobs. However, if you want to assign those competencies to specific jobs, you can do that by way of the Job Title validation table.
Activity: Completing the Rating Scale and Additional Form Options Sections of the Review Form

Scenario
You want to complete the review form that you started creating earlier. Your organization uses a 5-point rating scale for annual reviews and rounds performance ratings one decimal place. Weight the elements in the review form as follows:

- Questions: 25%
- Goals: 50%
- Competencies: 25%

Instructions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Complete the Rating Scale section of the review form using the information provided in the scenario.</td>
</tr>
<tr>
<td>2</td>
<td>Make the form available for use and save it.</td>
</tr>
</tbody>
</table>
Activity Results: Completing the Rating Scale and Additional Form Options Sections of the Review Form
Creating Review Plans

Overview

The second stage in the annual performance review cycle is creating a review plan. The review plan defines the execution strategy for the review, including the following:

- How: Performance standards as described in the review form
- Who: Employees included in the review
- When: Target completion date for the review

Activity: Selecting the Review Form, Employees, and Schedule for an Annual Review Plan

Scenario

You are preparing for your organization's annual review. You created the review form and now need to create the review plan. Use the information provided to complete the first three sections of the review plan.

- Review Form: Use the form you just created.
- Employees: Select a group of employees using the company code for Geneva Video Games.
- Schedule: Target completion date: A specific date that is three months from today's date

Instructions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Begin creating an annual review plan by completing the following:  
|      | - Name This Review Plan and Review Plan Description fields  
|      | - Review Form  
|      | - Employees  
|      | - Schedule |
| 2    | Skip the Milestones section and do not put the plan in use. |
| 3    | Click Done to save the sections of the review plan that you completed. |
Activity Results: Selecting the Review Form, Employees, and Schedule for an Annual Review Plan
**What Is Planned Distribution?**

Planned distribution is a method that organizations use to project the desired outcome of employee ratings distribution for an annual review. If your organization uses planned distribution, ADP Workforce Now Performance provides a way for you to define it when creating the review plan. You can then monitor the actual employee rating distribution against the planned employee rating distribution.

**Example**

You want to define your organization's planned employee rating distribution for the upcoming annual review.

**Activity: Using Planned Distribution**

**Instructions**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Open the review plan that you created.</td>
</tr>
</tbody>
</table>
| 2    | In the **Review Form** section, turn on **Planned Distribution**.  
**Result:** The Edit Distribution Curve page is displayed. |
| 3    | In the **Distribution %** fields, enter the following percentages in order from top to bottom:  
• 5  
• 20  
• 55  
• 15  
• 5  |
| 4    | Click **Done**.  
**Result:** The planned distribution preview is displayed in the Review Form section. |
| 5    | Turn off Planned Distribution. |

**Important Information**

Planned distribution acts as a baseline or guideline—it is not a mandate. ADP Workforce Now Performance does not force the distribution of employee ratings.
What Are Milestones?
Milestones represent a due date for each task in the review process.

Example
To keep the review plan on track to meet the target completion date, you set milestone dates for the distribution of reviews to reviewers and employees, for employees to complete their self-evaluations, for contributors to complete their assessments of the assigned employees, and for managers to complete their employees' reviews. You want to set up reminders so that employees, contributors, reviewers, and managers receive notifications three days before their milestone dates to ensure that they meet the dates.

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Due Date</th>
<th>Send Reminder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distribute review forms.</td>
<td>April 15</td>
<td>April 12</td>
</tr>
<tr>
<td>Employees and contributors complete review forms.</td>
<td>April 30</td>
<td>April 27</td>
</tr>
<tr>
<td>Managers complete and submit review forms.</td>
<td>May 10</td>
<td>May 7</td>
</tr>
</tbody>
</table>

Important Information
You cannot remove required milestones or create custom milestones.
■ Explore: Set Up Milestones Page

■ Overview

Use the Set Up Milestones page to specify the deadlines by which tasks must be completed during the review period. You can remove optional milestones.

■ Milestones and Descriptions

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>How would you like to enter the milestone due dates? Will employees complete a self-evaluation?</td>
<td>You must answer these two questions to determine the format and inclusion of certain milestones. You can enter milestone dates as specific dates or as days to target review completion. If you choose to have employees complete a self-evaluation as part of the review process, the application will include related milestones.</td>
<td></td>
</tr>
<tr>
<td>Notification to Begin Review Cycle</td>
<td>Required.</td>
<td></td>
</tr>
<tr>
<td>Practitioner Distributes Review Forms</td>
<td>Required. You have two options:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Practitioner distributes to reviewers first (default).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Practitioner distributes to everyone at the same time. If you select this option, the Reviewer Distributes Review Forms section is no longer available.</td>
<td></td>
</tr>
<tr>
<td>Reviewer Distributes Forms to Employees</td>
<td>Optional based on your selection in the Practitioner Distributes Review Forms section.</td>
<td></td>
</tr>
</tbody>
</table>
## Milestones and Descriptions (cont.)

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributor Feedback</td>
<td>Optional depending on whether the review will include contributors other than the manager, or reviewer.</td>
<td></td>
</tr>
<tr>
<td>Self-Evaluations</td>
<td>Required if employees will complete a self-evaluation.</td>
<td></td>
</tr>
<tr>
<td>Reviewer Completes and Submits Review</td>
<td>Required.</td>
<td></td>
</tr>
<tr>
<td>Review Approval</td>
<td>Optional depending on whether you want an approver to approve the reviews. The default is Yes as this is an industry best practice.</td>
<td></td>
</tr>
<tr>
<td>Share Review With Employees</td>
<td>Required.</td>
<td></td>
</tr>
<tr>
<td>Employee Acknowledges Review</td>
<td>Optional depending on whether you want employees to acknowledge their completed reviews. The default is Yes as this is an industry best practice.</td>
<td></td>
</tr>
</tbody>
</table>
Activity: Setting Up Milestones and Selecting the Status for an Annual Review Plan

Scenario

You are preparing for your organization's annual review. You defined the review form, employees, and target review completion date for the review plan. Now, you need to set up the milestones and select the review plan status. Your organization defines the milestones in "days to target review completion date." Employees complete a self-evaluation. You plan to use this review plan for all of your upcoming annual reviews.

Milestones

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Days to Target Review Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notification to Begin Review Cycle</td>
<td>30</td>
</tr>
<tr>
<td>Practitioner Distributes Review Forms</td>
<td>29</td>
</tr>
<tr>
<td>Reviewers Distributes Forms to Employees</td>
<td>27</td>
</tr>
<tr>
<td>Contributor Feedback and Self-Evaluations</td>
<td>20</td>
</tr>
<tr>
<td>Reviewer Completes and Submits Review</td>
<td>15</td>
</tr>
<tr>
<td>Review Approval</td>
<td>10</td>
</tr>
<tr>
<td>Share Review with Employees</td>
<td>7</td>
</tr>
<tr>
<td>Employee Acknowledges Review</td>
<td>3</td>
</tr>
</tbody>
</table>

Instructions

Complete the review plan that you started in the previous activity using the information provided in the scenario. Be sure to put the plan in use. Then repeat it indefinitely.

Putting the review plan in use makes the review details available to you so you can prepare for distribution.
Activity Results: Setting Up Milestones and Selecting the Status for an Annual Review Plan

<table>
<thead>
<tr>
<th>SET UP MILESTONES</th>
<th>PREVIEW TIMELINE</th>
<th>TIME BEFORE COMPLETION DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required Notify Practitioner to roll out review cycle</td>
<td></td>
<td>30 Days</td>
</tr>
<tr>
<td>Required Practitioner distributes review forms to Reviewers</td>
<td>Reviewer distributes review forms to employees</td>
<td>29 Days</td>
</tr>
<tr>
<td>ON Reviewer receives feedback from contributors</td>
<td>27 Days</td>
<td></td>
</tr>
<tr>
<td>Required Employee completes self-evaluation</td>
<td>20 Days</td>
<td></td>
</tr>
<tr>
<td>Required Reviewer completes and submits review</td>
<td>15 Days</td>
<td></td>
</tr>
<tr>
<td>ON Approver finalizes and approves reviews Setup Required</td>
<td>10 Days</td>
<td></td>
</tr>
<tr>
<td>Required Reviewer discusses and shares the review with the employee</td>
<td>7 Days</td>
<td></td>
</tr>
<tr>
<td>ON Employee acknowledges the review</td>
<td>3 Days</td>
<td></td>
</tr>
</tbody>
</table>

Milestones: New Hire Review Plan

Some milestones are the same in annual and new hire review plans. However, new hire review plan milestones do not include those that are related to employee self-evaluation and contributors because those are generally not used for new hire reviews.
Using the Performance Dashboard and Review Detail to Manage Reviews Pre- and Postdistribution

Overview

The Performance Dashboard is where you perform all of your performance review-related tasks. Depending on your role in the process—practitioner, manager/reviewer, or employee—you will see different information.

From the Performance Dashboard, you can access the review detail for all in-progress and scheduled reviews. The review detail and actions you can take on a review vary, depending on whether you are in the predistribution phase or postdistribution phase.

Explore: The Performance Dashboard

Elements and Descriptions

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header bar</td>
<td>There are separate dashboards for each of the review types: annual, new hire, disciplinary, and performance improvement plan (PIP). Click an icon to access the desired review plan.</td>
</tr>
<tr>
<td>Review name, milestones, and statuses</td>
<td>Each review displays milestones and a status for each milestone.</td>
</tr>
<tr>
<td>Data coins</td>
<td>A data coin indicates the progress of a review. The dark blue section indicates the percentage of employees who completed the review.</td>
</tr>
<tr>
<td>View List link</td>
<td>Click the link to display the Reviews page for the scheduled reviews.</td>
</tr>
</tbody>
</table>
What Are Review Statuses?

Overview

Each time you use a review plan, that instance or review event goes through several stages, referred to as statuses, before completion.

Statuses, Descriptions, and Actions You Can Take

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Actions That You Can Take</th>
</tr>
</thead>
</table>
| Scheduled       | • The review occurs in the future, and the review forms have not been distributed.  
                  • The review is listed on the Performance Dashboard in orange, and you can review the review details. | • Modify or change the review form on the Review Form page.                                |
|                 |                                                                             | • Modify the review plan elements on the Review Plan page, including the review form selected, the employees, the target review completion date, milestone dates, and status. |
| In Preparation  | • The first milestone has been delivered, but the review forms have not been distributed to reviewers. You can edit the milestone dates as long as the milestones are not completed.  
                  • The review is listed on the Performance Dashboard in red, and you can review the review details. | • Modify or change the review form on the Review Form page.                                |
|                 |                                                                             | On the Review Details page:                                                                |
|                 |                                                                             | • Update the milestone dates for any milestones not yet completed.                         |
|                 |                                                                             | • Modify the planned distribution, if applicable.                                          |
|                 |                                                                             | • Assign employees to reviewers.                                                           |
|                 |                                                                             | • Assign competencies to job titles.                                                      |
|                 |                                                                             | • Assign goals to employees.                                                               |
|                 |                                                                             | • Manage contributors.                                                                    |
|                 |                                                                             | • Terminate the review.                                                                   |
|                 |                                                                             | • Distribute forms to employees and reviewers.                                             |
| In Progress     | • The review forms are distributed but the review cycle is not completed. You can edit the milestone dates as long as the milestones are not completed  
                  • The review is listed on the Performance Dashboard in blue, and you can monitor the review's milestones to completion. | On the Review Details page:                                                                |
|                 |                                                                             | • Assign employees to reviewers.                                                           |
|                 |                                                                             | • Manage contributors.                                                                    |
|                 |                                                                             | • Terminate the review.                                                                   |
| Historical      | The review is complete.                                                     | None                                                                                     |
Activity: Initiating an Annual Review

Overview
In order to take any actions on a review in preparation for the review to begin, you need to move the review from the Scheduled status to the In Preparation status.

Scenario
You created the review plan for the annual review. You want to begin preparing for the review.

Instructions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Access the Review Details page for the review you created.</td>
</tr>
</tbody>
</table>
| 2    | Click **Prepare in Advance**.  
*Result:* A message is displayed asking you to confirm that you are ready to prepare the review in advance. |
| 3    | Click **Yes**.  
*Result:* The review moves to the In Preparation status. |
Activity: Reassigning Employees to a Reviewer and Assigning Competencies to a Job Title

Overview
When a review has a status of In Preparation, you can perform actions to prepare for distributing the review.

Scenario
In preparation for this review, you want to reassign any employees who do not have a reviewer and ensure all employees' job titles have competencies assigned to them.

Instructions, Part 1: Reassign Employees to a Reviewer

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Access the Review Details page for the review you created.</td>
</tr>
</tbody>
</table>
| 2    | Filter the list of employees by Reviewer to group employees without a reviewer.  
*Note:* You may need to click the Reviewer header twice to display the employees without a reviewer at the top of the list. |
| 3    | Select those employees, click Group Actions, and select Reassign Review. |
| 4    | Search for Krista Volker, select her, and then reassign the reviews to her.  
*Result:* The Reviewers data coin indicates there are no employees without reviewers. |

Instructions, Part 2: Assign Competencies to a Job Title

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>In the Job Title column, identify job titles in blue, which means the job titles do not have competencies assigned to them.</td>
</tr>
</tbody>
</table>
| 2    | Click one of the blue job titles.  
*Result:* The Edit - Job Title page is displayed. |
| 3    | Assign the following competencies to the job title and weight them accordingly.  
- Customer Service: 34%  
- Interpersonal Skills: 33%  
- Job Knowledge: 33%  
*Result:* The Competencies data coin reflects a 1, which is less than before you completed the activity. |

Important Information
You must weight competencies in order for them to be displayed in the review form.
Ensuring Goals Are Included in the Review Form

Overview

Your organization may assign goals to employees as a tool for evaluating performance. If you want to include those goals in the review form, you need to assign them to the employees and attach them to the applicable review.

Stages and Descriptions

<table>
<thead>
<tr>
<th>Stage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create organizational goals in the Performance Goals validation table.</td>
</tr>
<tr>
<td>2</td>
<td>Assign them to applicable employees by selecting Process &gt; Talent &gt; Performance Goals.</td>
</tr>
<tr>
<td>3</td>
<td>Create and assign team goals by selecting My Team &gt; Talent &gt; Performance Goals.</td>
</tr>
<tr>
<td>4</td>
<td>Create and assign personal goals for individual employees by selecting People &gt; Talent &gt; Performance Goals.</td>
</tr>
<tr>
<td>5</td>
<td>Attach goals—organizational, team, and personal—to be included in the review by selecting People &gt; Talent &gt; Performance Goals &gt; Reviews &amp; Weightings for each employee.</td>
</tr>
</tbody>
</table>

Additional Resources

For more information about performance goals, refer to the following resources:

- Manager and Employee learning bytes, accessible via Manager Self Service and Employee Self Service.

- *Completing Optional Tasks for Performance Reviews* job aid. This job provides a list of optional tasks, including those related to performance goals, completed by the practitioner, the manager, or the employee, outside of ADP Workforce Now Performance. It includes task descriptions and links to learning bytes. You can locate this job aid by selecting Process > Talent > Performance Dashboard > Reviews and clicking (learning bytes).
Activity: Attaching Goals to a Review and Distributing Reviews

Scenario
In preparation for the upcoming annual review, you want to ensure that goals are included on employees' review forms. After attaching goals to the review forms, distribute the reviews.

Instructions: Attaching Goals to a Review

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Access the GVG Employees list.  
* Click the Employee Search field.  
* In the Current List field, select GVG Employees. |
| 2    | Navigate to Alice Hoffman's Performance Goals page.  
**Tip:** In the employee header, click the Next arrow to move from one employee record to the next one. |
| 3    | Click Reviews & Weightings. |
| 4    | Click Attach Goals. |
| 5    | Select all of the goals and click Add Selected Goals. |
| 6    | Assign weightings as follows:  
* Corporate Training: 33%  
* Job Performance: 34%  
* Improve Skills: 33% |
| 7    | Click Done. |
| 8    | Repeat the process for Anders Robinson. |

Instructions: Distributing the Review
On the Review Details page, click Distribute Reviews.
Closing a Performance Review Cycle

Overview

Closing a performance review cycle is the last stage in the performance review process for annual reviews.

You close the review cycle when all of the related reviews are completed and no other actions are needed.

You cannot make any other changes after closing the review cycle.

Close the Review Cycle Job Aid

Instructions

On the Review Details page for the review, click Actions and select Close Review Cycle.
Knowledge Check

1. Which tasks can you perform while in the Prepare the Review for Distribution stage? (Select all that apply.)
   a. Assign or reassign reviewers to employees.
   b. Make changes to completed milestones.
   c. Assign competencies to job titles.
   d. Monitor the progress of the review by viewing the Performance Dashboard.
   e. Distribute the review form to reviewers.

2. You are on the Create Review Plan page and you want to create a new hire review plan. What do you need to do before creating a new hire review plan?
   a. Create a new hire review form.
   b. Select the employees that will be included in the new hire review plan.
   c. Distribute the new hire review plan.
   d. Move the review plan from the Scheduled status to the In Preparation status.
Knowledge Check (cont.)

3. The header of Peggy's Chester's review form indicates there are zero goals to evaluate. What could be the cause in this case? (Select all that apply.)

   a. Peggy's manager did not assign goals to her.
   b. Peggy does not have goals attached to this review.
   c. Peggy's goals were assigned to her after the distribution of review forms.
   d. The practitioner did not include goals in the review plan.

4. What can you infer from the list of milestones for this annual review? (Select all that apply.)

   a. The employees will not complete a self-evaluation.
   b. Practitioners will distribute review forms to employees.
   c. Contributors will provide feedback on employees.
   d. Reviewers will distribute forms to employees.

5. Which of the following are true about including questions in a review form? (Select all that apply.)

   a. Questions that are displayed on the supplied review form are included in the form unless you remove them.
   b. You can edit supplied questions by copying them and then editing them.
   c. Created and edited questions are displayed at the top of the question bank list.
   d. You must select created and edited questions in the question bank in order to add them to the form.
Course Closing

How to Access Support Job Aid
ADP provides various resources to help you perform your tasks after class.

Instructions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>At the top of any page, click support.</td>
</tr>
</tbody>
</table>
| 2    | In the Search field, enter a topic and then click search.  
Result: The available online Help and training are displayed. |
| 3    | Review the available resources.  
If You Want To | Then |
| Read online Help | Click the Documentation tab and select a topic |
| Access a learning byte | In the Learning Resources section, click Just-in-Time Learning |
| 4    | To close the Support page, click Back. |

How to Access TheBridge.adp.com Job Aid
Join TheBridge.adp.com, an online community for payroll and HR professionals where you can ask questions, share knowledge, make connections, and learn from industry experts and peers about a broad range of human capital management topics.

Instructions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 If You Are</td>
<td>Then</td>
</tr>
<tr>
<td>Logged on to ADP Workforce Now</td>
<td>At the top of any page, click The Bridge.</td>
</tr>
</tbody>
</table>
| Not logged on to ADP Workforce Now | 1. Access thebridge.adp.com/welcome.  
2. Log on using your ADP Workforce Now user name and password. |
| 2    | Search for content using the key word "performance" to locate resources about this topic. |

Next Steps
What will you do in the next week to apply what you learned in class?

Make sure to register for the next class in the ADP Workforce Now Performance training plan: Completing an Employee Review in ADP Workforce Now Performance.
### Continuing Education Credits

ADP is an approved provider of recertification credit hours (RCHs) by the American Payroll Association (APA) and continuing professional education (CPE) credits by the National Association of State Boards of Accountancy (NASBA). Most ADP courses are eligible for RCHs and CPE credits.

RCHs and CPE credits provide recognition for updating or broadening professional competencies and may be used to maintain certifications such as the Certified Payroll Professional (CPP) and Certified Public Accountant (CPA). Professional organizations establish their own certification procedures, which are subject to change.

Professional organizations often require documentation of class objectives, agenda, and duration, along with a certificate of completion. This information is provided at the end of your handout manual. At your request, your instructor will provide you with a certificate of completion at the end of this class.

### Training Evaluation

Please take a moment to complete the evaluation.
Creating Review Forms and Review Plans in ADP Workforce Now Performance (80949_4)

Program Content
For practitioners who use ADP Workforce Now® Performance only: This course prepares participants, through discussion and hands-on practice, to use ADP Workforce Now Performance to create review forms and review plans to prepare for and complete performance reviews. Topics include creating review forms, creating review plans, using the Performance Dashboard and review detail to understand the status of a review, and closing a performance review cycle. Note: Check with your implementation specialist before taking this course to ensure that your organization uses ADP Workforce Now Performance.

Objectives
Upon completing this course, participants will be prepared to do the following:

- Create review forms.
- Create review plans.
- Use the Performance Dashboard and review detail to manage reviews pre- and postdistribution.
- Close a performance review cycle.

Audience
This course is intended for practitioners who need to set up and manage performance reviews in ADP Workforce Now.

Prerequisites
Before beginning this course, participants must complete the following:

- Introduction to Performance in ADP Workforce Now
- Setting Up and Maintaining ADP Workforce Now Performance
- Preparing for an Annual or a New Hire Review in ADP Workforce Now Performance

Advance Preparation
None

Participant Materials
Participants need to print the Creating Review Forms and Review Plans in ADP Workforce Now Performance handout manual.

Method of Presentation
Virtual class (VC), Group Internet Based
Duration
2 hours

Continuing Education Credits
This course may be eligible for the following recertification credit hours (RCHs), continuing professional education (CPE) credits, and continuing education units (CEUs):

RCH: 2.0  
CPE: 2.0  
CEU: .2

Note: ADP is unable to grant formal RCH, CPE, or CEU credits to a participant logged on to class through a mobile device. For more information, see the Training Policy.

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted on a 50-minute hour.

ADP, LLC, Employer Services, is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org

ADP, LLC, Major Account Services, Learning and Performance, has been accredited as an Authorized Provider by the International Association for Continuing Education and Training (IACET), 1760 Old Meadow Road, Suite 500, McLean, VA 22102; (703) 506-3275.

In accordance with the American Payroll Association (APA), recertification credit hours (RCHs) apply to Certified Payroll Professional (CPP) and Fundamental Payroll Certification (FPC) credentials.

Recommended Field of Study (NASBA)
Specialized Knowledge and Applications

Cost and Training Policy
For information on course cost, registration, and cancellation policies, refer to the Training Policy.

Learner Records and Privacy Policy
Learner records are available on Learn@ADP within 24 hours after participants complete their training classes. To access learner records, refer to these instructions.

View ADP’s Privacy Policy on Learn@ADP.

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