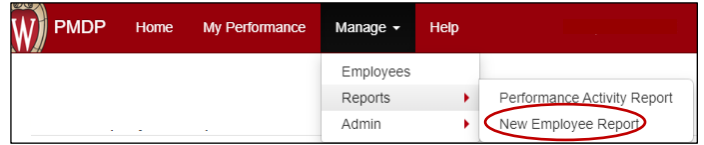


HOW TO: GENERATE A NEW EMPLOYEE REPORT



Administrative users (division and department) can generate a report that will identify probation performance activity due dates and status.

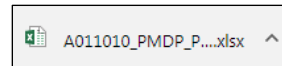
1. Log into PMDP. Click Manage and choose Reports – New Employee Report.



2. Choose the UDDS for the report. Only the UDDS(s) for which you have permission will show. The date range will default to one year from the current date. Adjust to reflect the start date range for employees you want included in the report.

Report Start Date and Report End Date are checking against the **Employee Start Date** (e.g. date range of 1/1/2018-2/1/2018 would return data on any employee who started a new position within that date range.)

3. Click Run Report. The report will download as an Excel File.



BEST PRACTICE

To check status of Thirty Day Conversations, run the report for employees who started in the previous thirty days. To check status for Mid-Probation Evaluations, run the report for employees who started in the previous six months (this will capture both 6-month and one-year probation lengths). And to check status for Probation Summaries, run the report for employees who started in the previous 12-14 months.

HOW TO: FILTER RESULTS



1. Click the small triangle button next to a column title to choose the filter. By default, all options are selected. Click on (Select All) to deselect.
2. Click the item(s) to include. E.g. to see results for "BOSS, CHRIS", click the check box next to "BOSS, CHRIS". Click OK.

Employee Name	Supervisor Name	Employee Start Date	Jobcode	Jobcode De
FIRSTJO		1/7/2018	00162	FINANCIAL
ONUP,		10/1/2018	M95LN	ASST DIR, U
EMPLOY		2/1/2018	S44DN	INFORM PR
WEEKEN		3/19/2018	L78LL	ASST DIR, P
FRIDAY,		4/16/2018	20501	INVENT CO
CAMEB,		4/30/2018	20501	INVENT CO
EMPLOY		5/13/2018	R17DN	AUDITOR
RAYCHE		5/13/2018	00163	FINANCIAL
DOIN, H		7/15/2018	T05DN	PROCUREM
DESK, F		7/8/2018	T05DN	PROCUREM
STARTE		9/1/2018	R82DN	DATA BASE
TOSTAR		9/4/2018	00162	FINANCIAL



HOW TO: READ REPORT RESULTS



The Excel spreadsheet will return 15 columns of data. The chart below defines the information in each column.

Column	Title	Definition
A	UDDS	UDDS of employee
B	Department Name	Corresponding department name
C	Employee EmplId	Employee ID of the employee
D	Employee Position Number	Position number (Helpful if the employee holds multiple positions.)
E	Employee Name	Only returns employees who have a start date within the specified range.
F	Supervisor Name	Name of supervisor assigned to employee (Even if the supervisor is outside this UDDS, the name will show if they have responsibility for an employee within this UDDS.)
G	Employee Start Date	Start date for this position
H	Job Code	Job code for this position
I	Job Code Description	Title
J	Thirty Day Due	Due date for the thirty-day conversation
K	Thirty Day Status	Will return the status of the evaluation. Evaluation Not Started, Waiting on Employee, Waiting on Supervisor, Waiting on Discussion, Waiting on Employee Acknowledgement, Complete, Closed by HR.
L	Mid-Probation Due	Will show the calculated date of halfway between start date and probation end date
M	Mid-Probation Status	Will return the status of the evaluation. Evaluation Not Started, Waiting on Employee, Waiting on Supervisor, Waiting on Discussion, Waiting on Employee Acknowledgement, Complete, Closed by HR.
N	Probation Summary Due	Will show the probation end date.
O	Probation Summary Status	Will return the status of the evaluation. Evaluation Not Started, Waiting on Employee, Waiting on Supervisor, Waiting on Discussion, Waiting on Employee Acknowledgement, Complete, Closed by HR.

The example below shows that within the date range 1/1/2018-10/01/2018, Chris Boss:

- Completed all performance activities (Thirty Day, Mid-Probation, Probation Summary) with Aih Comeback.
- Completed the Thirty Day Conversation and Mid-Probation Evaluation for Itsmy Firstjob; however, the Probation Summary is still waiting for the employee to acknowledge.
- Completed the Thirty Day Conversation and started the Mid-Probation Evaluation for New Employee.
- Has not started any performance activity for Earnina Paycheck or Ima Starter.

Employee Name	Supervisor Name	Employee Start Date	Thirty Day Due	Thirty Day Status	Mid-Probation Due	Mid-Probation Status	Probation Summary Due	Probation Summary Status
FIRSTJOB, ITSMY	BOSS, CHRIS	1/7/2018	2/6/2018	Complete	4/7/2018	Complete	7/6/2018	Waiting on Employee Acknowledgement
EMPLOYEE, NEW	BOSS, CHRIS	2/1/2018	3/3/2018	Complete	8/2/2018	Waiting on Supervisor	1/31/2019	Evaluation Not Started
CAMEBACK, AIH	BOSS, CHRIS	4/30/2018	5/30/2018	Complete	7/30/2018	Complete	10/30/2018	Complete
PAYCHECK, EARNINA	BOSS, CHRIS	5/13/2018	6/12/2018	Evaluation Not Started	11/11/2018	Evaluation Not Started	5/12/2019	Evaluation Not Started
STARTER, IMA	BOSS, CHRIS	9/1/2018	10/1/2018	Evaluation Not Started	3/2/2019	Evaluation Not Started	8/31/2019	Evaluation Not Started

