

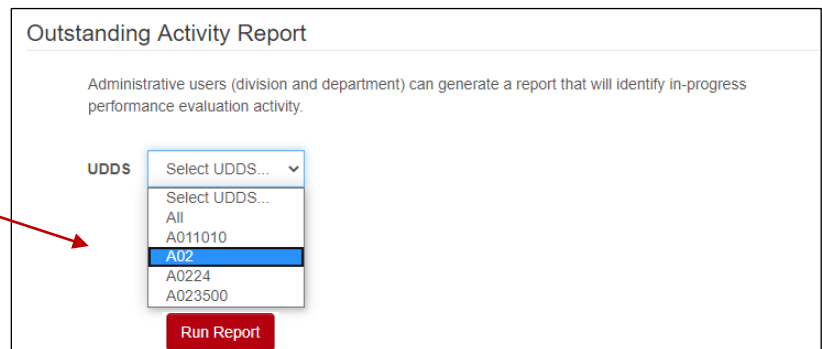
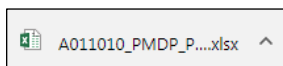
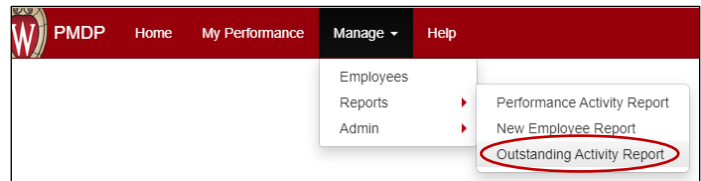
This report assists you in identifying and cleaning up records in PMDP. The report returns incomplete evaluations and their current status. This information allows you to follow up with the supervisor or employee and take steps to move the evaluation along to complete status.

HOW TO: GENERATE AN OUTSTANDING ACTIVITY REPORT



Administrative users (division and department) can generate a report that will identify in-progress performance evaluation activity.

1. Log into PMDP. Click Manage and choose Reports – Outstanding Activity Report.
2. Choose the UDDS for the report. Only the UDDS(s) for which you have permission will show. There is no date range required for this report. The report will return any in-progress activity for the selected UDDS.
3. Click Run Report. The report will download as an Excel File.



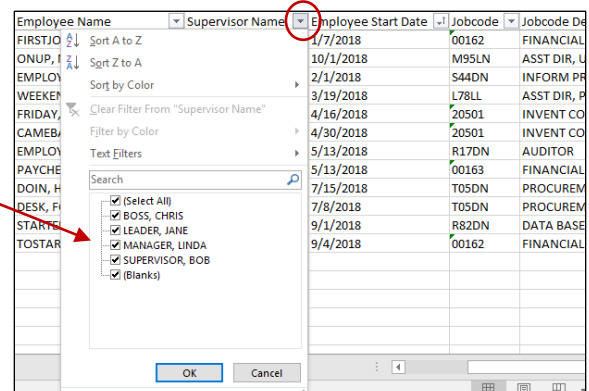
BEST PRACTICE

This report can be run at any time to check for incomplete activity. The best time to run the report is at the conclusion of an evaluation period (midpoint or summary). You can use the report to determine the current status of open evaluations (waiting on supervisor, waiting on employee, waiting on discussion, waiting on employee acknowledgement) and follow up as needed. This follow up may include contacting the supervisor or employee and asking them to take the next steps to complete the evaluation or delete if it was created in error. Email addresses are included in the report for easy reference. You may also need to close an evaluation (Closed by HR) on behalf of an employee or supervisor who is no longer with the organization.

HOW TO: SORT AND/OR FILTER RESULTS



1. If you wish to sort the data, click the small triangle button next to a column title and choose the type/direction of the sort. Text columns offer the option to sort alphabetically or date columns can be sorted oldest to newest or newest to oldest.
2. If you wish to filter the data, 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.
3. Click the item(s) to include. E.g. to see results for “BOSS, CHRIS”, click the check box next to “BOSS, CHRIS”. Click OK.



HOW TO: READ REPORT RESULTS



The Excel spreadsheet will return 12 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 an in-progress/incomplete evaluation.
F	Employee Email	Returns the email address in PMDP.
G	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.)
H	Supervisor Email	Returns the email address in PMDP.
I	Evaluation Period start date	Returns the date entered for the start of the evaluation period. If this appears blank, it is because the evaluation has been launched, but the supervisor has not entered dates.
J	Evaluation Period end date	Returns the date entered for the end of the evaluation period. If this appears blank, it is because the evaluation has been launched, but the supervisor has not entered dates.
K	Evaluation Type	Returns one of the following: Thirty Day Conversation, Mid Probation Conversation, Summary Probation Evaluation, Midpoint Conversation, Summary Evaluation
L	Evaluation Status	Returns one of the following: Waiting on Supervisor, Waiting on Employee, Waiting on Discussion, Waiting on Employee Acknowledgement



HOW TO: FOLLOW UP ON REPORT RESULTS



The chart below identifies possible report results and appropriate follow up action(s).

Evaluation Status	Definition	Follow Up
Waiting on Supervisor	Indicates an evaluation has been launched and may be waiting on any of the following actions by the supervisor: <ul style="list-style-type: none"> • Enter content into evaluation • Click “Allow Employee View” • Click “Finalize” 	If supervisor or employee is no longer employed in your UDDS, open the evaluation and click the “Close” button to mark the evaluation as Closed by HR and provide notation. Otherwise, view the evaluation, determine next steps needed and contact the supervisor to advance the evaluation or delete the evaluation if it was launched in error.
Waiting on Employee	This status will only show on a Probation Summary Evaluation or a Summary Evaluation. Indicates the supervisor has allowed employee view, but the employee needs to: <ul style="list-style-type: none"> • Complete the self-appraisal (if not complete) • Click “Allow Supervisor View” 	If supervisor or employee is no longer employed in your UDDS, open the evaluation and click the “Close” button to mark the evaluation as Closed by HR. Otherwise, contact the employee and advise them to complete the Self-Appraisal and allow supervisor view.
Waiting on Discussion	Both the supervisor and employee have allowed view and both have access to view all content in the evaluation. This status indicates the supervisor needs to: <ul style="list-style-type: none"> • Click the “Finalize Evaluation” button 	If supervisor or employee is no longer employed in your UDDS, open the evaluation and click the “Close” button to mark the evaluation as Closed by HR. Otherwise, contact the supervisor and have them schedule and/or complete the conversation and when all content is reviewed, click “Finalize Evaluation”.
Waiting on Employee Acknowledgement	The supervisor has finalized the evaluation, but the employee needs to: <ul style="list-style-type: none"> • Click “Employee Acknowledgement” button 	If supervisor or employee is no longer employed in your UDDS, open the evaluation and click the “Close” button to mark the evaluation as Closed by HR. Otherwise, contact the employee and have them open the evaluation and click “Employee Acknowledgement”. Remind the employee they will have an opportunity to Agree or Disagree with the content.

