

KRONOS PERFORMANCE EVALUATION GUIDE

MANAGER EDITION

Foundation Performance Evaluation Contact

If you have any questions, please contact fdnhr@cpp.edu

Cal Poly Pomona Foundation, Inc.
Employment Services

KRONOS PERFORMANCE EVALUATION GUIDE

Purpose: The purpose of the “Employee Performance Evaluation” is to increase communication between employees and supervisory personnel concerning the performance of employees in accomplishment of their assigned duties and responsibilities, the establishment of specific work-related goals and objectives and the preparation of a personal development plan for further employee development.

This guide provides steps on how to complete an Employee Performance Evaluation through the Kronos Workforce Ready (UKG) site. This guide will walk you step by step from a Manager 1’s perspective, Manager 2’s perspective, Human Resources perspective, and an Employee’s perspective.

Key Terms:

Employee: A person that is employed by The Foundation either Part-time or Full-time (Student Employees will not be included).

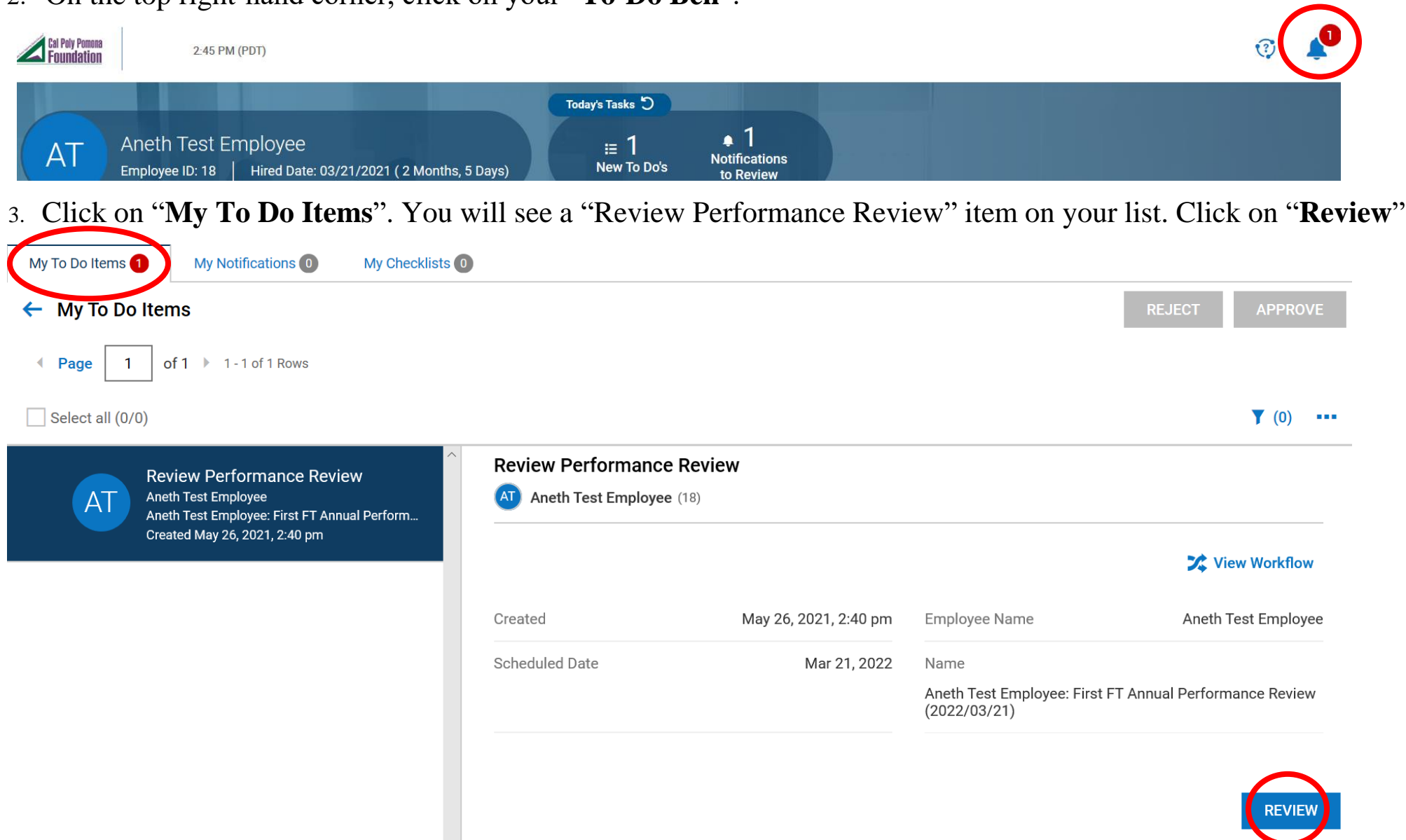
Manager 1: The direct supervisor of the employee.

Manager 2: The direct supervisor for Manager 1.

Note: **Part-time** employees workflow consist of steps involving Manager 1, Human Resources, Employee and Employment Services Manager with a total of 5 competency categories. **Full-time** employee’s workflow consists of steps involving Manager 1, Manager 2, Human Resources, Employee and Employment Services Manager with a total of 9 competency categories.

Employee (Part 1) Self Evaluation– Full -Time Employees Only

1. Login to your Kronos Workforce Ready (UKG) Account.
2. On the top right-hand corner, click on your “To-Do Bell”.



Cal Poly Pomona Foundation

2:45 PM (PDT)

AT Aneth Test Employee
Employee ID: 18 | Hired Date: 03/21/2021 (2 Months, 5 Days)

Today's Tasks

1 New To Do's

1 Notifications to Review

My To Do Items 1 My Notifications 0 My Checklists 0

← My To Do Items

REJECT APPROVE

Page 1 of 1 1 - 1 of 1 Rows

Select all (0/0)

Review Performance Review
Aneth Test Employee
Aneth Test Employee: First FT Annual Perform...
Created May 26, 2021, 2:40 pm

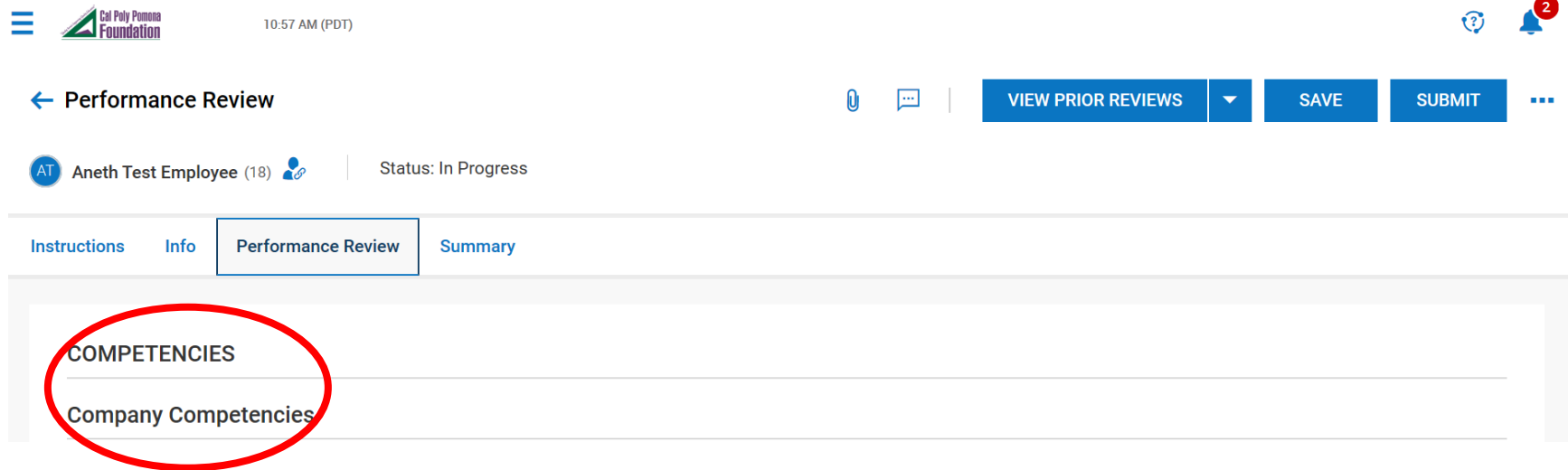
Review Performance Review
AT Aneth Test Employee (18)

View Workflow

Created	May 26, 2021, 2:40 pm	Employee Name	Aneth Test Employee
Scheduled Date	Mar 21, 2022	Name	Aneth Test Employee: First FT Annual Performance Review (2022/03/21)

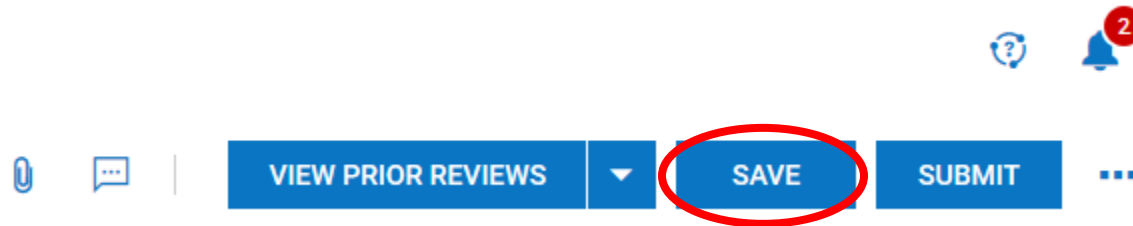
REVIEW

4. Read the instructions. Once done click on the “Performance Review” tab.
5. Please rate and comment on each of the company competencies.
6. Comments should include factual information and be descriptive. Discuss specific examples.



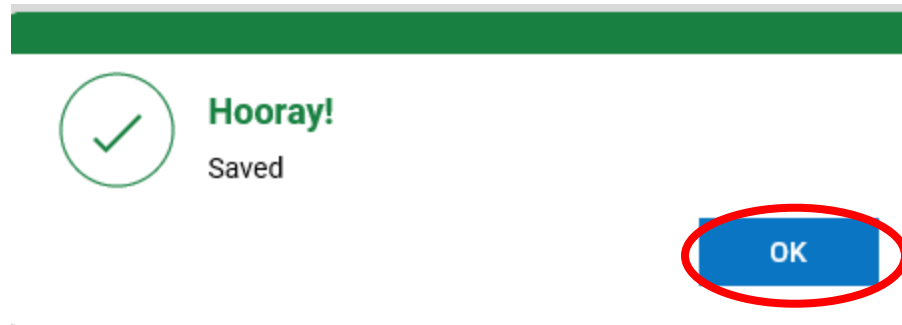
The screenshot shows the top of a web application. In the top left, there is a logo for 'Cal Poly Pomona Foundation' and the time '10:57 AM (PDT)'. In the top right, there are icons for help and notifications (with a red '2' badge). Below the header, there is a navigation bar with a back arrow and the text 'Performance Review'. To the right of this are buttons for 'VIEW PRIOR REVIEWS', 'SAVE', and 'SUBMIT'. Below the navigation bar, there is a section for 'Aneth Test Employee (18)' with a status of 'In Progress'. Below this, there are four tabs: 'Instructions', 'Info', 'Performance Review' (which is selected and highlighted with a red circle), and 'Summary'. The 'Performance Review' tab contains a section titled 'COMPETENCIES' with a sub-section 'Company Competencies' below it. The 'COMPETENCIES' section is also highlighted with a red circle.

7. Upon completing all competencies based on your employees work performance click “**Save**” on the top right-hand corner.



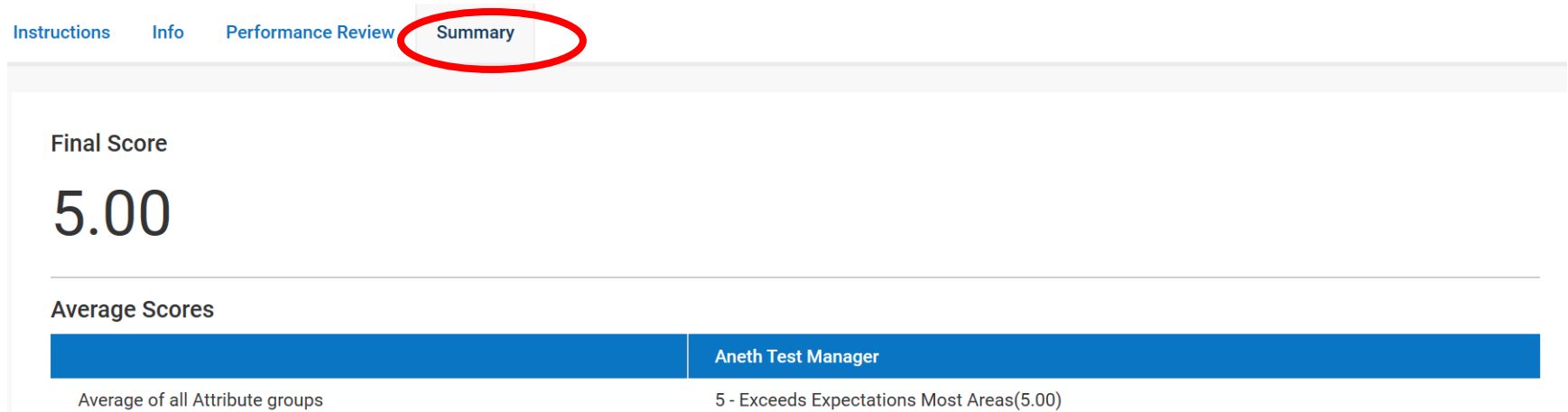
The screenshot shows the bottom of the web application. It features a navigation bar with a back arrow and the text 'Performance Review'. To the right of this are buttons for 'VIEW PRIOR REVIEWS', 'SAVE', and 'SUBMIT'. The 'SAVE' button is highlighted with a red circle. In the top right corner, there are icons for help and notifications (with a red '2' badge).

8. Once your work has been saved successfully, you will receive this “**Hooray!**” message. Click “**OK**”.



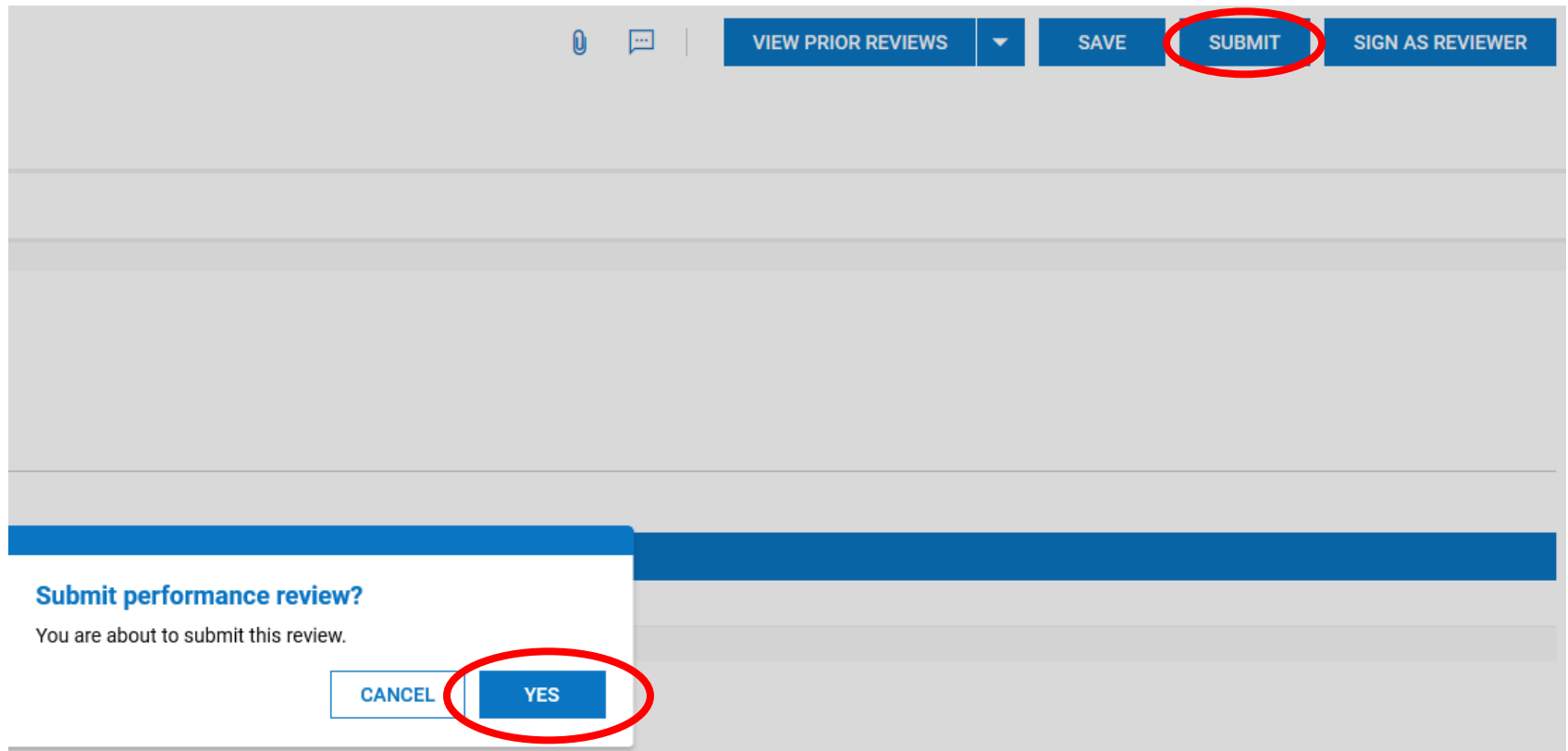
9. Next, click on the “**Summary**” tab.

10. Review and verify that you have filled out each competency to the best of your ability.

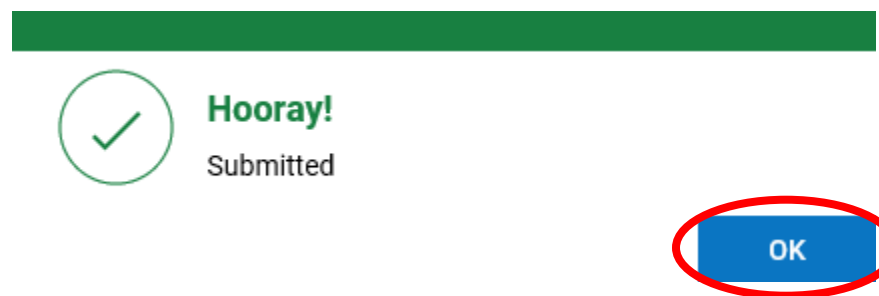


11. Once the review and verification process is complete you will go to the top right-hand corner and click “**Submit**”

12. A pop-up window will appear asking “**Submit performance review?**” Click “**Yes**”.



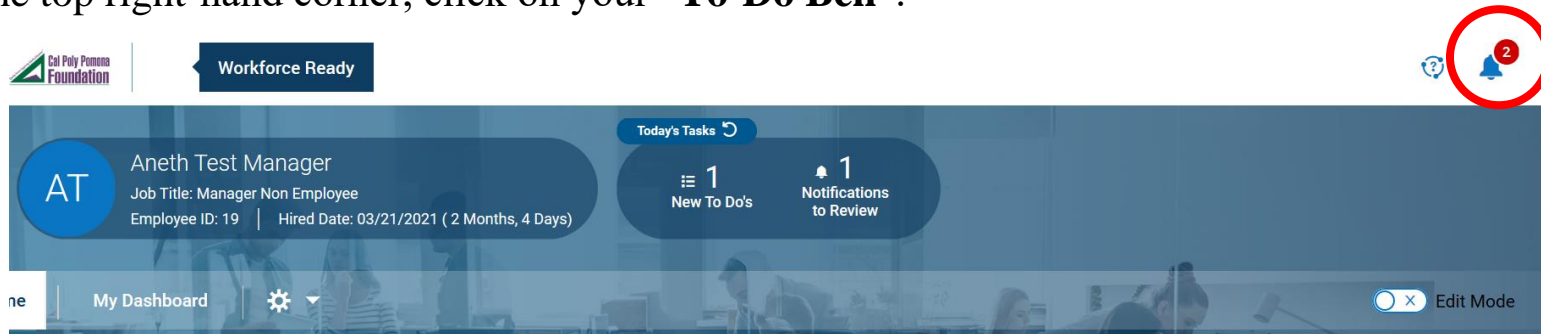
13. Once your work has been reviewed successfully, you will receive this “**Hooray!**” message. Click “**OK**”.



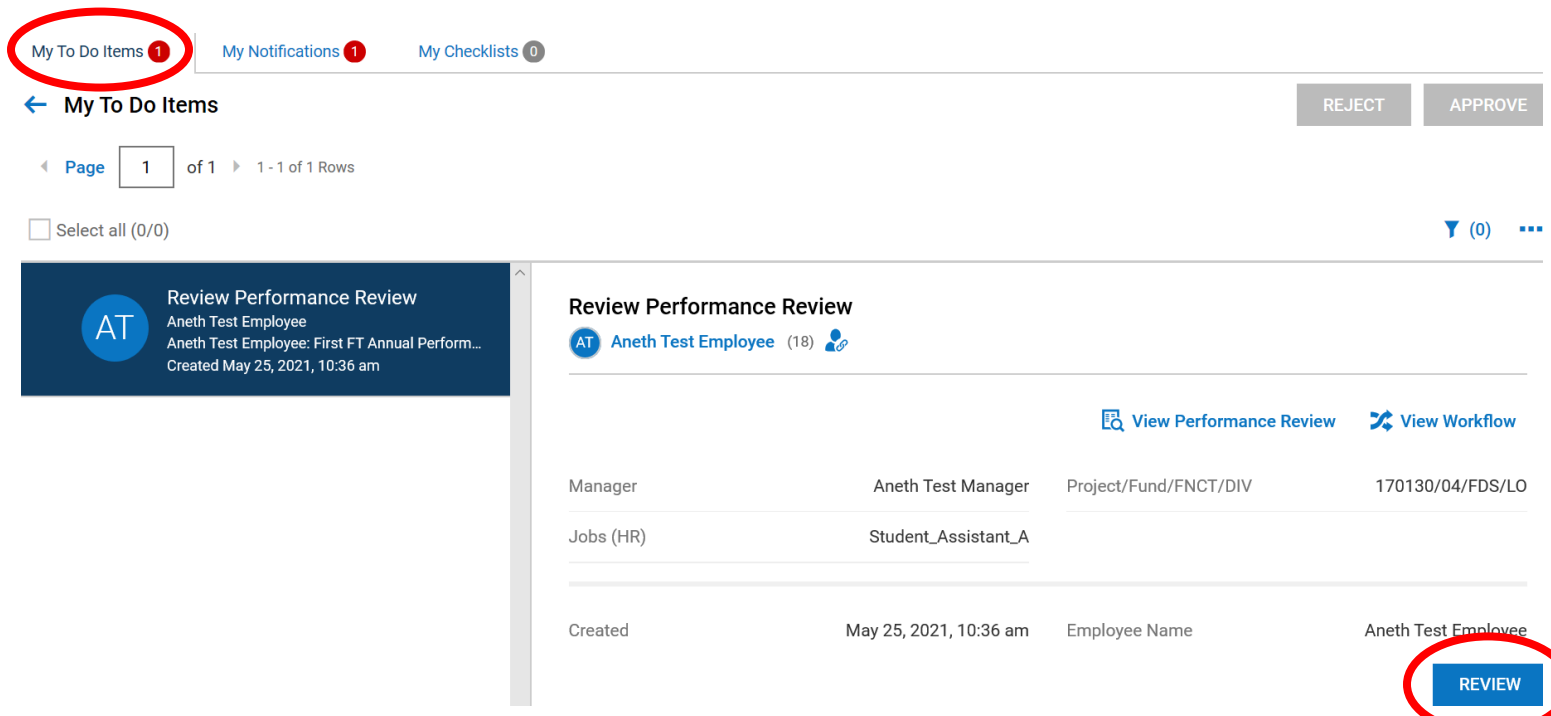
14. Your manager will schedule a time for you two to meet to discuss the Performance Evaluation.

Manager 1 (Part 1)

1. Login to your Kronos Workforce Ready (UKG) Account.
2. On the top right-hand corner, click on your “**To-Do Bell**”.



3. Click on “**My To Do Items**” you will see a “**Review Performance Review**” message.
4. Proceed by clicking “**Review**” on the bottom right hand corner.



5. Review the “**Instructions**”

6. Once you are ready to complete the performance review click on the “**Performance Review**” tab.

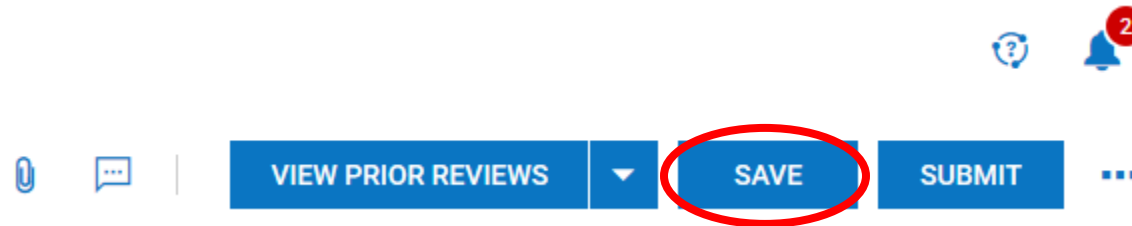
The screenshot shows the top of a web application. At the top left is a back arrow and the text "Performance Review". To the right are icons for a document and a comment bubble, followed by buttons: "VIEW PRIOR REVIEWS" (with a dropdown arrow), "SAVE", "SUBMIT", and a three-dot menu. Below this is a header bar with a user profile icon labeled "AT", the text "Aneth Test Employee (18)", and a status indicator "Status: In Progress". Below the header is a tab bar with four tabs: "Instructions", "Info", "Performance Review", and "Summary". The "Instructions" and "Performance Review" tabs are circled in red. The "Performance Review" tab is currently selected, displaying "Manager Instructions". The instructions text reads: "Welcome to the annual Performance Review. The performance management process is more than the annual review. The process includes setting clear expectations and providing specific and ongoing formal and informal feedback. When all competency categories are completed thoughtfully with active engagement of both manager and employee, the results for all parties are very positive."

7. Please rate and comment on each of the competencies. For Full-Time Employees evaluations you will be able to see their notes from their self-evaluation.

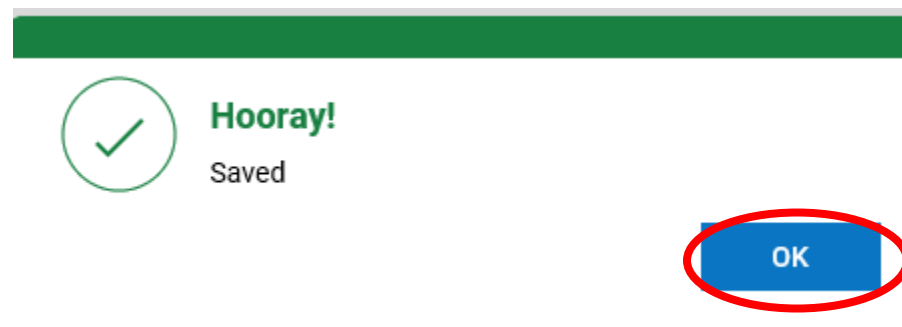
8. Comments should include factual information and be descriptive. Discuss specific examples.

This screenshot shows the same web application interface as the previous one, but with the "Performance Review" tab selected. The "Instructions" tab is now unselected. The main content area is titled "COMPETENCIES" and contains a sub-section labeled "Company Competencies". Both the "COMPETENCIES" title and the "Company Competencies" label are circled in red. The top navigation bar and header information remain the same.

9. Upon completing all competencies based on your employees work performance click “**Save**” on the top right-hand corner.

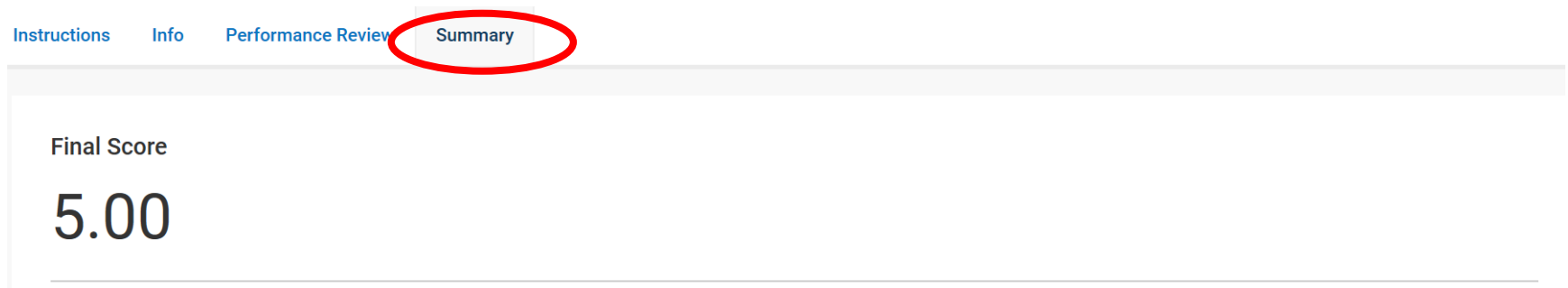


10. Once your work has been saved successfully, you will receive this “**Hooray!**” message. Click “**OK**”.



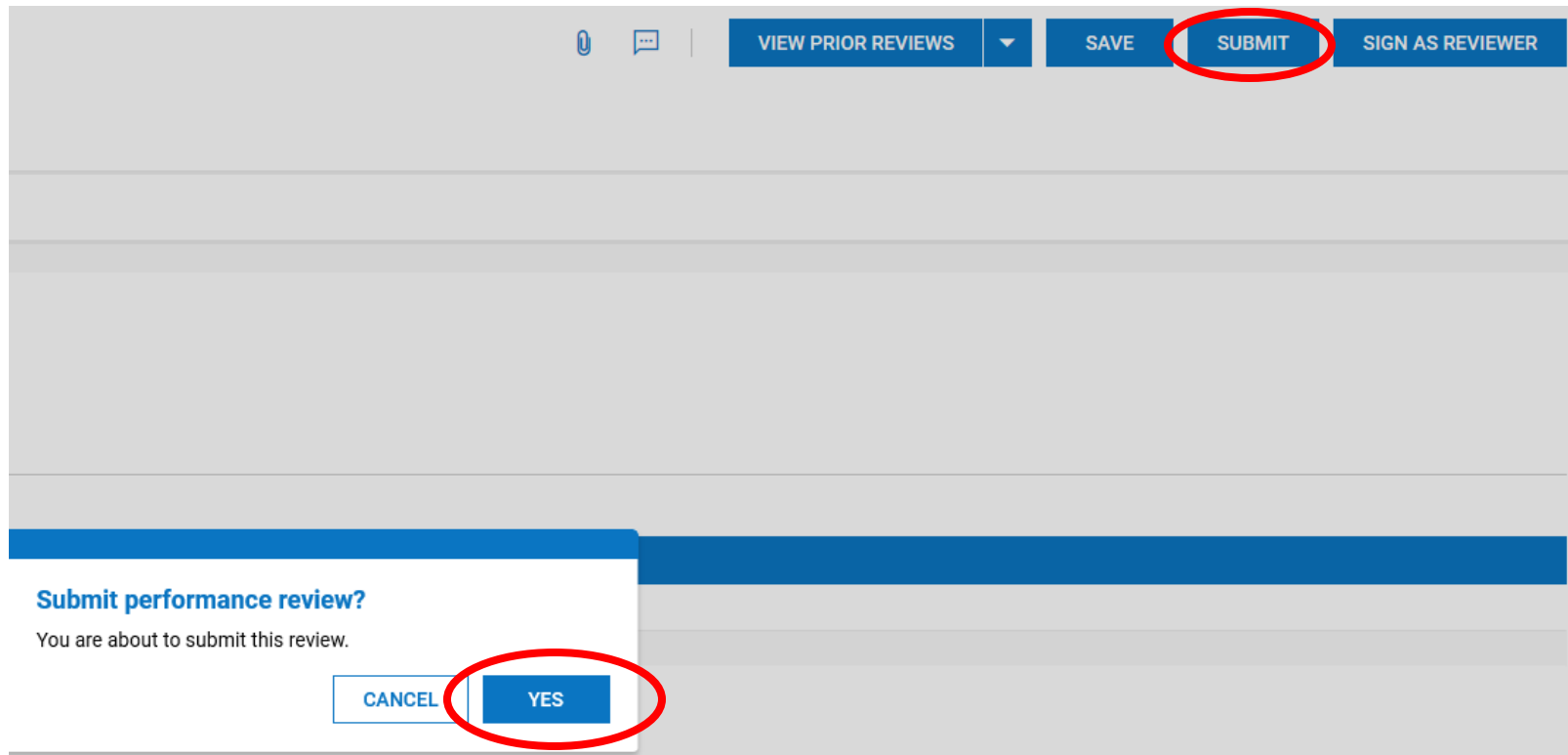
11. Next, click on the “**Summary**” tab.

12. Review and verify that you have filled out each competency to the best of your ability.

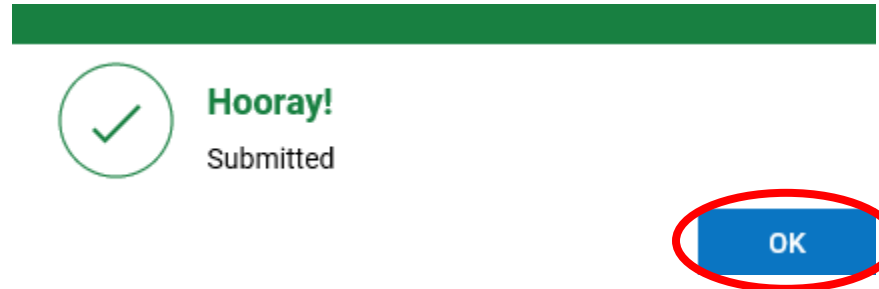


13. Once the review and verification process is complete you will go to the top right-hand corner and click “**Submit**”

14. A pop-up window will appear asking “**Submit performance review?**” Click “**Yes**”.



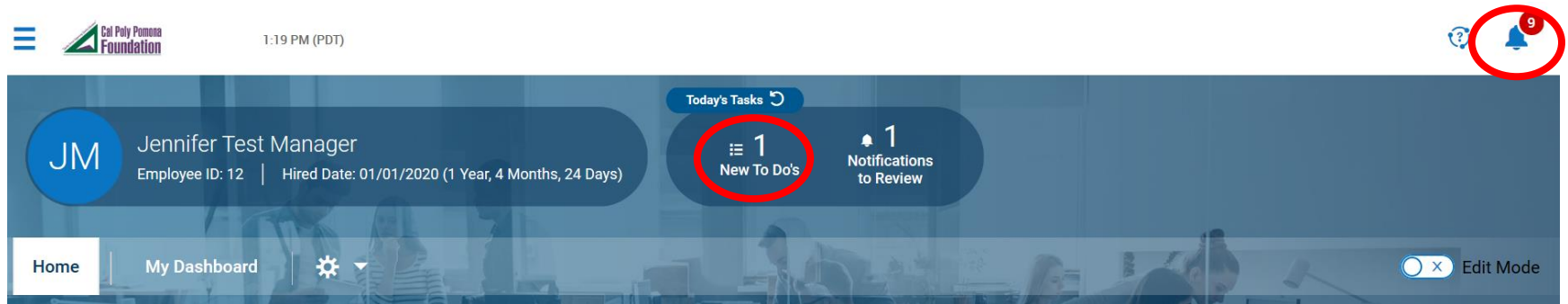
15. Once your work has been reviewed successfully, you will receive this “**Hooray!**” message. Click “**OK**”.



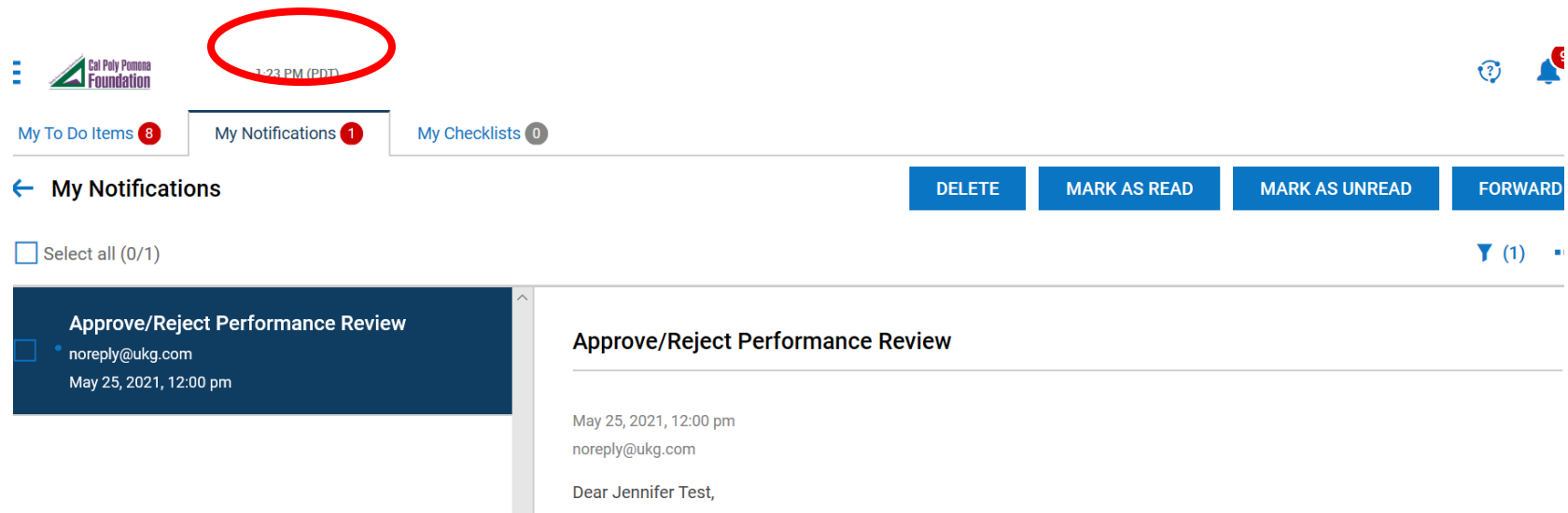
16. This completes the First Phase of the Employee Evaluation process. Now Manager 2 will receive the review with comments for approval.

Manager 2 (Only for Full-Time Employees)

1. Manager 2 login to your Kronos Workforce Ready (UKG) Account.
2. On the top right-hand corner, click on your “**To-Do Bell**”.



3. Click on “**My Notifications**” you will see an “**Approve/Reject Performance Review**” message. Read the message.



4. Proceed by clicking on “**My To Do Items**” on the top left hand corner. There will be a “**Check Performance Review**” message.
5. Click on “**Check**” to review Manager 1’s review for their employee.

AT

Check Performance Review
Aneth Test Employee
Aneth Test Employee: First FT Annual Perform...
Created May 25, 2021, 12:00 pm

Check Performance Review

AT Aneth Test Employee (18)

View Performance Review

View Workflow

Manager	Aneth Test Manager	Project/Fund/FNCT/DIV	170130/04/FDS/LO
Jobs (HR)	Student_Assistant_A		

Created

May 25, 2021, 12:00 pm

Employee Name

Aneth Test Employee

REJECT

CHECK

6. Go to “**Performance Review**” and review Manager 1’s comments for their employee. If you need to reject go back and click "Reject".

← Performance Review

VIEW PRIOR REVIEWS

▼

CHECK

AT Aneth Test Employee (18)

Status: In Progress

Instructions

Info

Performance Review

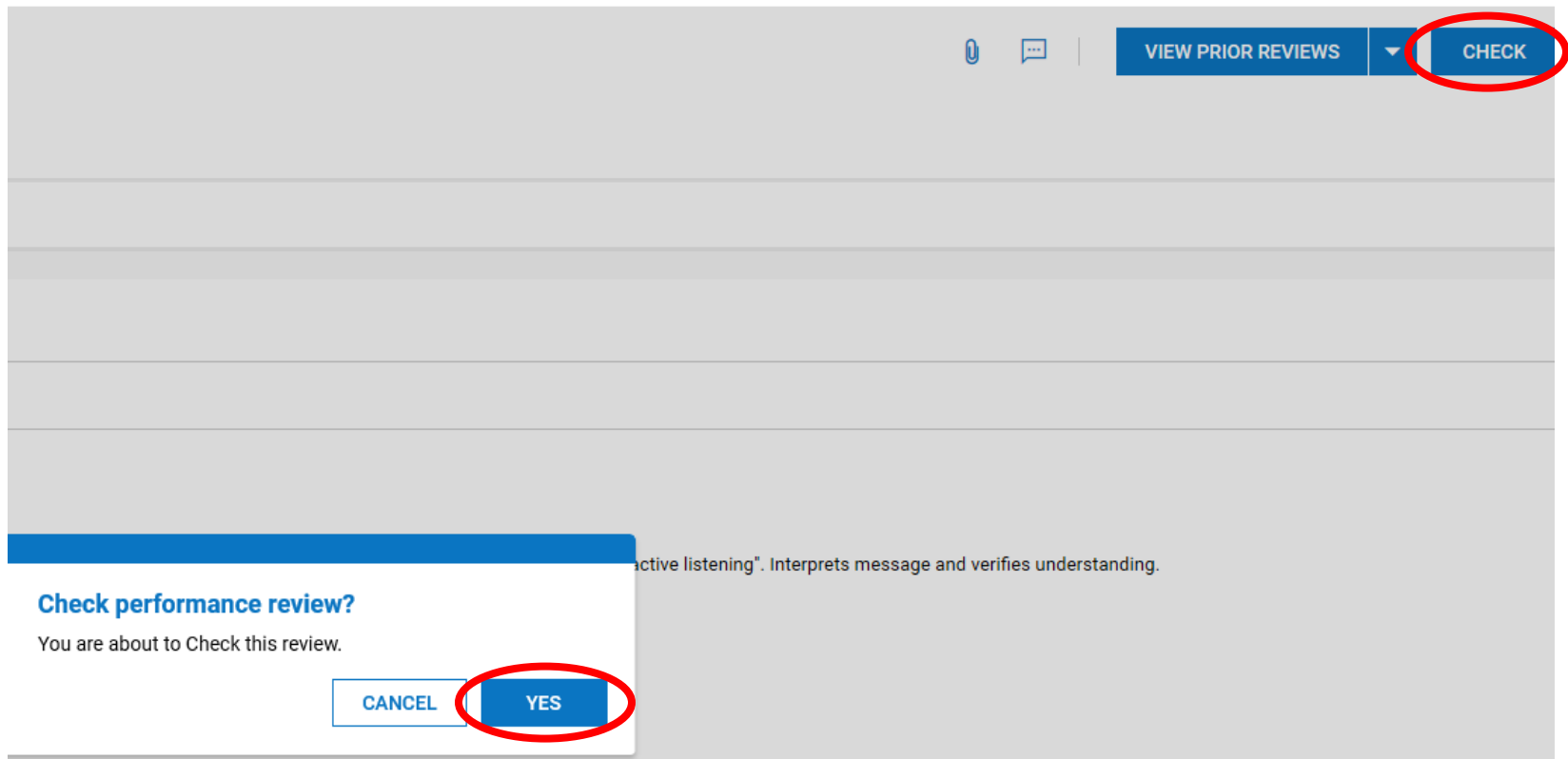
Summary

COMPETENCIES

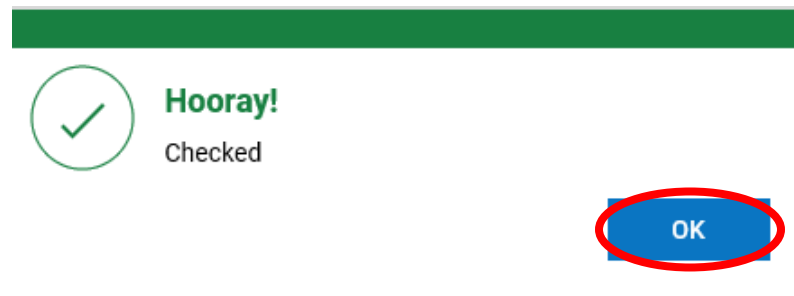
Company Competencies

Competencies

7. Once ready click “**Check**” and “**Yes**”.



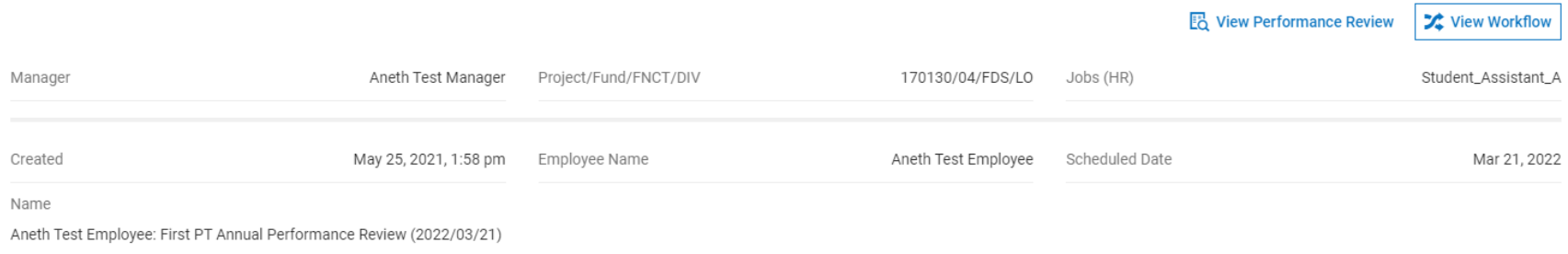
8. Once your work has been reviewed successfully, you will receive this “**Hooray!**” message. Click “**OK**”.



9. This concludes the Second Phase of the Employee Evaluation process.

Human Resources Department

1. Login to your Kronos Workforce Ready (UKG) account. Go to your “**To Do Bell**” on the top right-hand corner.
2. Under “**My To Do Items**” you will see a message that states “**Check Performance Review**”
3. Click on “**Check**”



The screenshot shows the Kronos Workforce Ready interface for a performance review. At the top right, there are two buttons: "View Performance Review" and "View Workflow". Below these, the review details are displayed in a table-like format:

Manager	Aneth Test Manager	Project/Fund/FNCT/DIV	170130/04/FDS/LO	Jobs (HR)	Student_Assistant_A
Created	May 25, 2021, 1:58 pm	Employee Name	Aneth Test Employee	Scheduled Date	Mar 21, 2022
Name Aneth Test Employee: First PT Annual Performance Review (2022/03/21)					



4. Go to your “**Performance Review**” Tab.
5. Once done reviewing either go back and reject or click “**Check**” on the top right-hand corner.



The screenshot shows the Kronos Workforce Ready interface for a performance review. At the top, there is a navigation bar with a back arrow and the text "Performance Review". Below this, there is a header section with the employee's name "Aneth Test Employee (18)" and the status "Status: In Progress". Below the header, there is a tab bar with four tabs: "Instructions", "Info", "Performance Review", and "Summary". The "Performance Review" tab is circled in red. At the top right, there are two buttons: "VIEW PRIOR REVIEWS" and "CHECK". The "CHECK" button is circled in red.

6. This completes the Third Phase of the Employee Performance Evaluation. Now it will go back to Manager 1.

Manager 1 (Part 2)

1. IMPORTANT: First step is to schedule and meet with your employee and go over his/her performance rating.

a. Scheduling an appt with your employee is crucial. Both parties should be aware of the meeting and its purpose.

2. Once you have met with your employee and went over his/her performance review, login to your Kronos Workforce Ready Account.
3. Go to your **“To-Do Bell”** on the top right-hand corner.
4. Click on **“My Notifications”**. You will see a message **“Performance Review Submitted: Meet with...”**

My To Do Items 1 My Notifications 0 My Checklists 0

← My Notifications DELETE MARK AS READ MARK AS UNREAD FORWARD

☐ Select all (0/1) (1) ...

☐ Performance Review Submitted: Meet wit...
noreply@ukg.com
May 25, 2021, 2:05 pm

Performance Review Submitted: Meet with Aneth Test Employee

May 25, 2021, 2:05 pm
noreply@ukg.com

Dear Aneth,

Now that the Performance Review for Aneth Test Employee has passed secondary approval, please make arrangements to meet with Aneth to go over the Performance Review.

You currently have a Collect Note step in your To Do Bell for this employee. DO NOT complete this step until you have physically met with Aneth to go over his/her performance rating.

Thank you.

5. Then go to **“My To Do Items”**.
6. There will be a message **“Collect Note”**.
7. Include the **Date and Time** you met with your employee under notes. Then click **“Add Note”**. Then **“Add”**.


Cal Poly Pomona Foundation 2:24 PM (PDT)

My To Do Items 1 My Notifications 0 My Checklists 0

← My To Do Items REJECT APPROVE

Page 1 of 1 1 - 1 of 1 Rows

Select all (0/0) (0) ...

**Collect Note**
Performance Review Request
Aneth Test Employee
Created May 25, 2021, 2:06 pm

*****IMPORTANT INFORMATION***** Now that you have completed this performance review, please meet with the employee in person to discuss their appraisal. Once you have done so, return back to this screen and enter the date that you met with the employee. Once you enter the date and add this note, you will get a "dummy" Check step assigned to you in your To Do Bell. For the "dummy" Check step, all you need to do is click the Check button, and then click Check again. Doing this will allow the employee to see their performance review scores in the system, so it is very important that you meet with the employee to discuss their evaluation before completing this "dummy" Check step.

Comment *

Met with Aneth Test Employee on Tuesday 5/25/2021 at 11:00am

ADD NOTE

8. Once you submit your note, the next step will be the buffer step that allows your employee to review Manager 1's notes on their performance.



Done!

Note has been successfully collected.

OK

9. This completes the Fourth Phase of the Employee Performance Evaluation.

Manager 1 (Part 3)

Buffer Step: After completing this step your employee will be able to login to Kronos and review Manager 1's competency notes.

1. Login to your Kronos Workforce Ready (UKG) account.
2. Go to your To-Do Bell on the top right-hand corner.
3. Click on “My To Do Items”. There will be a message from “**Check Performance Review**”.
4. Click “**Check**”.
5. Then “**Check**” on upper right-hand corner.

The screenshot displays the 'Performance Review' section of the Kronos Workforce Ready interface. At the top, there is a navigation bar with a back arrow and the text 'Performance Review'. To the right of this bar are icons for a document and a bell with a red notification dot. Further right is a blue button labeled 'VIEW PRIOR REVIEWS' with a dropdown arrow, followed by a blue button labeled 'CHECK' which is circled in red, and a three-dot menu icon. Below the navigation bar, the user's name 'Aneth Test Employee (18)' is shown next to a profile icon, and the status 'Status: In Progress' is displayed. A tabbed interface below shows four tabs: 'Instructions', 'Info', 'Performance Review' (which is active), and 'Summary'. The main content area of the 'Performance Review' tab shows 'Final Score' followed by a large '5.00'. A vertical scrollbar is visible on the right side of the content area.

6. This completes the Fifth Phase of the Employee Performance Evaluation.

Employee (Part 2)

1. Login to your Kronos Workforce Ready (UKG) account.
2. Go to your To-Do Bell on the top right-hand corner.
3. Review and read your “**Notifications**”.
4. Go to “**My To Do Items**”.
5. Read your “**Collect Note**” message and follow the instructions.
6. Once done click “**Add Note**”.

My To Do Items 1 My Notifications 1 My Checklists 0

← My To Do Items REJECT APPROVE

Page 1 of 1 1 - 1 of 1 Rows

☐ Select all (0/0) Y (0) ...

Collect Note
Performance Review Request
Aneth Test Employee
Created May 25, 2021, 3:47 pm

Please add your comments regarding your evaluation. After submitting this note, please click Sign in your To Do items to complete this portion of the review. Employee Acknowledgment: My signature means my supervisor has discussed this document with me and that I have been given the opportunity to make comments, but it does not necessarily imply my agreement with its contents.

Comment

SKIP ADD NOTE

7. Then sign by clicking “**Sign**” at the bottom right hand corner.
8. Review your evaluation once more. When ready click “**Sign as Employee**” on the top right-hand corner.

← My Performance Review



SAVE

SIGN AS EMPLOYEE



Aneth Test Employee (18)

Status: In Progress

9. In order to sign you will need to type in your last 4 of SSN.

Sign As Employee

Please type your (Aneth Test Employee) SSN to confirm.

Last 4 of SSN *

By clicking the "OK" button, you acknowledge that you have read, understand and agree to the terms and conditions of this form.

CANCEL

I AGREE

10. Once you agree you will receive a “Hooray” message! Click “OK”.

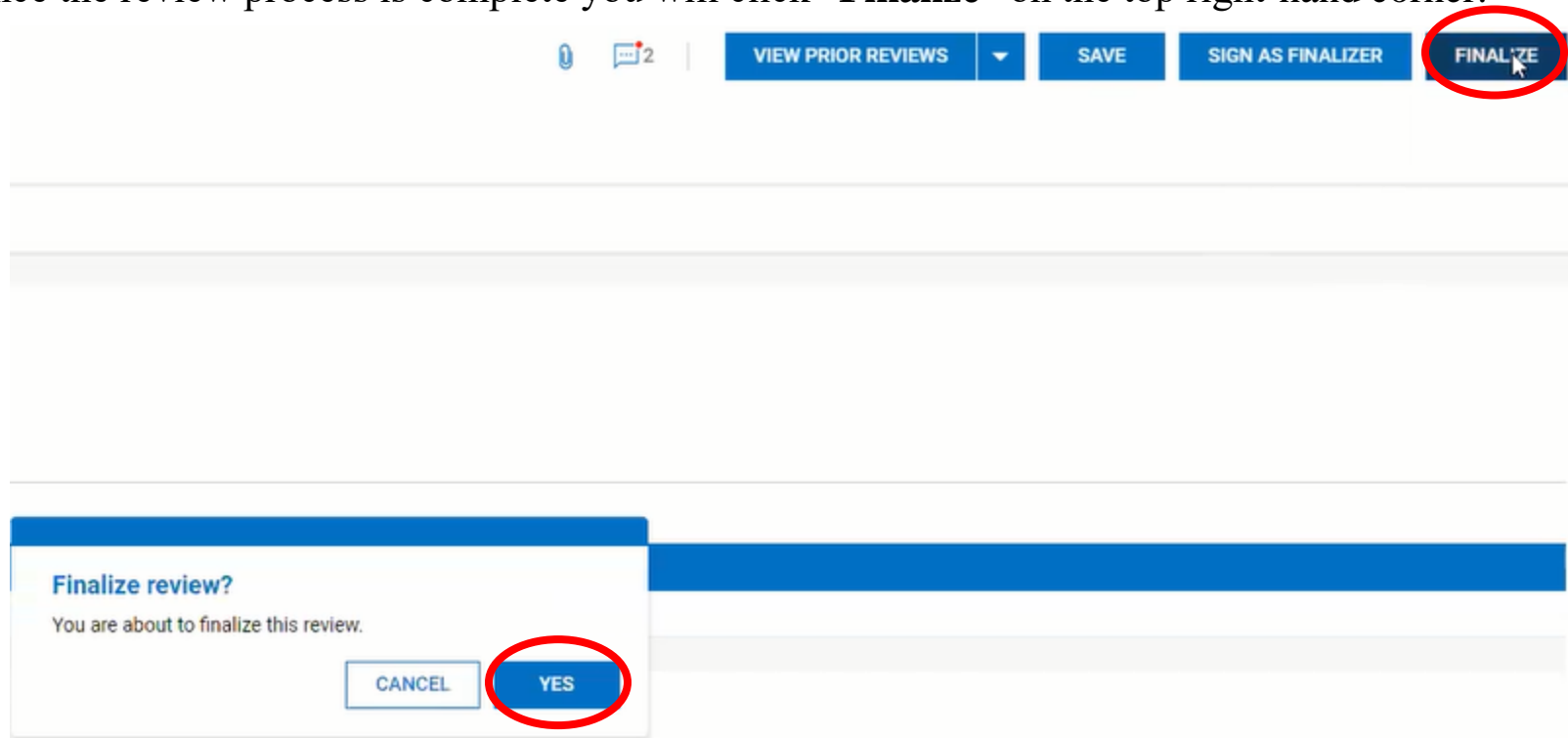
Hooray!

Performance Review has been successfully signed

OK

Employment Services Manager: Finalized Step

1. Login to your Kronos Workforce Ready (UKG) account.
2. Go to your To-Do Bell on the top right-hand corner.
3. Review and read your “**Notifications**”.
4. Go to “**My To Do Items**”.
5. Read your “**Finalize Performance Review**” message.
6. Click “**Finalize**”.
7. Review Employee’s Performance review by going to “**Summary**”.
8. Once the review process is complete you will click “**Finalize**” on the top right-hand corner.



9. This completes the Final Phase of the Employee Performance Evaluation.