Performance Appraisal Tracking Tool in LOUIE – Administrative View

For those administrative staff who help department heads keep track of appraisal completion, a specific view has been created that allows you to run a report showing all the classified staff, service professionals and post-doctoral scholars in your department. This report will show when the last appraisal was completed and when the next one is due. *It will not show the individual appraisal ratings.*

If this is a role you play in your department or division, you may use the ePASS to request the **NAU_HR Bus Manager PA Reports** role in LOUIE. You'll be able to view all the departments you have access to in your current administrative role.

The employee types that have appraisals entered and tracked in LOUIE are listed below, along with the abbreviations used in the "Salary Administration Plan" column of the reports:

CLS	classified staff
SPF	service professional
POD	post-doctoral scholar

Once you have the approved role, log in to LOUIE and navigate to *Manager Self Service > Performance Management > Performance Appraisal Reports > Perf. Appraisal Dept LookUp.*

The Last Review Type will either be an Annual Supervisor appraisal or a Probationary appraisal. The Last Review Date is the date the employee signed the appraisal. The Review Period From and To Dates reflect the timeframe covered by the last appraisal. You'll see the date that the next appraisal is due (Next Review Date - highlighted in green). Note: if you have a newer employee who has not yet had an appraisal at NAU, you will only see the Next Review Date.

Because you may have access to multiple departments, you can use the lookup function to view only the employees in one department:

By selecting just one department, you see only the employees in that department.

Because you may use this report to review which employees have appraisals due, you can click on the column title "Next Review Date" and it will sort in ascending order by the next review date.

Performance Appraisal Review by Department — This information reflects the entry of all appraisals received in Human Resources as of: 10/04/2018

1112223   Mark   Ruffalo
Actor

Show Employees in this Department 30600

Employee ID	Employee Record	First Name	Last Name	Job Title	Salary Administration Plan	Employee Status	Department ID	Department Name	VP Area	Last Review Type	Last Review Date	Review Period From Date	Review Period To Date	Next Review Date	Reports To Position	Supervisor	Supervisor's Email Address
1	0	Mark	Ruffalo	Actor	SPF	Active	30600	Avengers	Executive Vice President	Annual-Sup	10/05/2017	07/01/2016	06/30/2017	09/30/2018	00004357	Lee,Stan	Employee@nau.edu
2	0	Scarlett	Johansson	Actor	CLS	Active	30600	Avengers	Executive Vice President	Probation	08/21/2018	01/01/2018	06/30/2018	09/30/2019	00004357	Lee,Stan	Employee@nau.edu
3	0	Chadwick	Boseman	Actor	SPF	Active	30600	Avengers	Executive Vice President	Annual-Sup	09/21/2017	07/01/2016	06/30/2017	09/30/2018	00003654	Downey Jr.,Robert	Employee@nau.edu
4	0	Chris	Hemsworth	Actor	SPF	Active	30600	Avengers	Executive Vice President	Annual-Sup	10/04/2017	07/01/2016	06/30/2017	09/30/2018	00003654	Downey Jr.,Robert	Employee@nau.edu

Personalize | Find | First 1-6 of 6 Last

Review Period To Date	Next Review Date	Reports To Position	Supervisor	Supervisor's Email Address
06/30/2018	09/30/2018	00004372	Evans,Chris	Employee@nau.edu
06/30/2017	09/30/2018	00004357	Lee,Stan	Employee@nau.edu
	01/02/2019	00004372	Evans,Chris	Employee@nau.edu
06/30/2018	09/30/2019	00004372	Evans,Chris	Employee@nau.edu
06/30/2018	09/30/2019	00004372	Evans,Chris	Employee@nau.edu
06/30/2018	09/30/2019	00004372	Evans,Chris	Employee@nau.edu

Click the title again and it will order the records in descending order by review date.

This function to sort by ascending or descending order works on any column title. For example, you can click on 'Last Name' to sort in alpha order, click on "Salary Administration Plan" to sort by employee type, or click on "Supervisor" to sort or group by supervisor name.

Helping Track Missing 'Reports To' Information

If an employee does not have a 'reports to' record in LOUIE, they will NOT show up on the supervisor's view. However, they **will** show up on the administrative view report that you'll see. We are asking you to please help to monitor and correct these so that all employees have a listed supervisor and all information can be viewed by supervisors. *Example*: one of your supervisor's direct reports resigns and the position is open while a search is being done. Our recommendation is that the employees who reported to that person be given a new 'reports to' in LOUIE – basically just assign a new supervisor on a temporary basis. That could be the next level supervisor or another supervisor in the department. This is also necessary so that the employee has someone who is approving time off, timesheets, etc. By having the assigned 'reports to', they'll also be visible on the supervisor's report.

Appraisals are entered into the system as they come into HR. However, depending on the time of year and the volume, the time to complete the entry can fluctuate. To let you know how caught up data entry is (and, therefore, how up-to-date the tracking tool information is), the date field below will be updated as entry is completed.

If you want to download the report to excel, click on the spreadsheet icon:

If the excel spreadsheet doesn't download, remember to check and make sure you are allowing pop-ups in your web browser. (For information on how to do that, visit the ITS webpage https://nau.service-now.com/sp?id=kb_article&article=KB0014425.)

When you open the downloaded excel spreadsheet, you may get the message below. This is common when downloading from peoplesoft. Simply click "yes" and your spreadsheet will open.

Microsoft Excel   ✕

⚠️   The file format and extension of 'ps (11).xls' don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway?

          Yes   No   Help
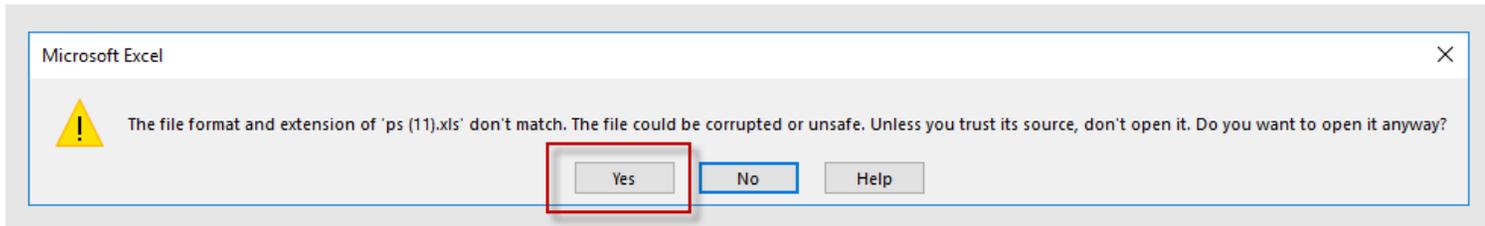
If, when reviewing the appraisal completion information, you find there is information you believe is incorrect or missing, please email HR Performance Appraisals. Please be sure to provide the employee name, employee ID and what you believe to be incorrect.