

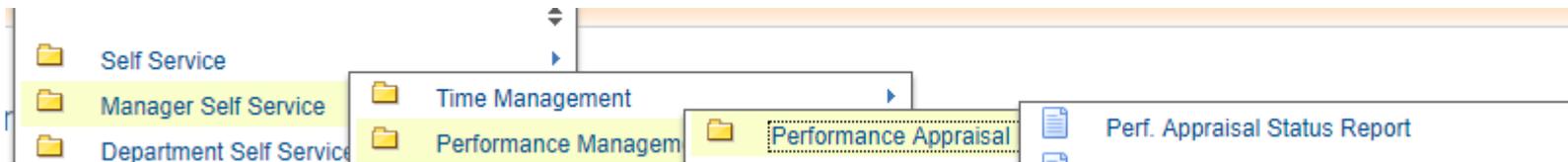
Performance Appraisal Tracking Tool in LOUIE – Supervisor View

As a supervisor of classified staff, service professional, and/or post-doctoral scholar employee, you can now review your employees' last appraisal completion information, as well as, when the next appraisal is due.

The employee types that have appraisals entered and tracked in LOUIE are the following, including the abbreviations used in the Salary Administration Plan column of the reports:

CLS	classified staff
SPF	service professional
POD	post-doctoral scholar

Log in to LOUIE and navigate to **Manager Self Service > Performance Management > Performance Appraisal Reports > Performance Appraisal Status Report:**



You will have two options to view information. 'My Direct Reports' gives you your classified staff, service professional and post-doctoral direct reports. 'All Reporting Employees' gives you a list of all your direct reports plus all classified staff, service professional or post-doctoral employees that report up through those direct reports.

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

654321 Stan Lee
Creator

[My Direct Reports](#) [All Reporting Employees](#)

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	Last Rating	Next Review Date	Reports To Position	Supervisor	Supervisor's Email Address
1	0																	

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Click on “My Direct Reports” and you will get a downloadable report of your direct reports’ performance appraisal completion information and the date the next appraisal is due (Next Review Date – highlighted in green). 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 rating they received, as well as, 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.

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6543210 Stan Lee
Creator

My Direct Reports All Reporting Employees

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	Last Rating	Next Review Date
1	0	Mark	Ruffalo	Actor	SPF	Active	30600	Avengers	Executive Vice President	Annual-Sup	10/05/2017	07/01/2016	06/30/2017	Exceptional Performance	09/30/2018
2	0	Scarlett	Johansson	Actor	CLS	Active	30600	Avengers	Executive Vice President	Probation	08/21/2018	01/01/2018	06/30/2018	Exceptional Performance	09/30/2019
3	0	Chris	Evans	Actor	POD	Active	30610	Avengers 2	Executive Vice President	Annual-Sup	09/11/2017	07/01/2016	06/30/2017	Very Good Performance	09/30/2018
4	0	Robert	Downey Jr.	Actor	SPF	Active	30600	Avengers	Executive Vice President	Annual-Sup	10/04/2018	07/01/2017	06/30/2018	Exceptional Performance	09/30/2019

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Click on “All Reporting Employees” and you will be provided the information on your direct reports, as well as, all the employees that report to those direct reports.

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1	0	Mark	Ruffalo	Actor	SPF	Active	30600	Avengers	Executive Vice President	Annual-Sup	10/05/2017	07/01/2016	06/30/2017	Exceptional Performance	09/30/2018		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	Exceptional Performance	09/30/2019		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	Exceptional Performance	09/30/2018		Downey Jr., Robert	Employee@nau.edu
4	0	Chris	Evans	Actor	POD	Active	30610	Avengers 2	Executive Vice President	Annual-Sup	09/11/2017	07/01/2016	06/30/2017	Very Good Performance	09/30/2018		Lee, Stan	Employee@nau.edu
5	0	Chris	Hemsworth	Actor	SPF	Active	30600	Avengers	Executive Vice President	Annual-Sup	10/04/2017	07/01/2016	06/30/2017	Very Good Performance	09/30/2018		Downey Jr., Robert	Employee@nau.edu
6	0	Tom	Holland	Actor	SPF	Active	30610	Avengers 2	Executive Vice President	Annual-Sup	09/04/2018	07/01/2017	06/30/2018	Exceptional Performance	09/30/2019		Evans, Chris	Employee@nau.edu

Note: If an employee does not have a 'reports to' record in LOUIE, they will NOT show up on your report. However, they will show up on the administrative view report. We will be asking those administrative staff in the departments to monitor and correct these so that all employee information can be viewed by supervisors. **Example:** one of your 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 you, as the next level supervisor, or another supervisor in the department. This is also necessary so that they have someone who is approving time off, timesheets, etc. By having the assigned 'reports to', they'll be visible on your report.

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

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4	0	Robert	Downey Jr	Actor	SPF	Active	30600	Avengers	Executive Vice President	Annual-Sup	10/04/2018	07/01/2017	06/30/2018	Exceptional Performance	09/30/2019
5	0	Samuel	Jackson	Actor	SPF	Active	30600	Avengers	Executive Vice President	Annual-Sup	09/22/2017	07/01/2016	06/30/2017	Exceptional Performance	09/30/2018

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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	Last Rating	Next Review Date
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3	0	Mark	Ruffalo	Actor	SPF	Active	30600	Avengers	Executive Vice President	Annual-Sup	10/05/2017	07/01/2016	06/30/2017	Exceptional Performance	09/30/2018
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Click the title again and it will order the records in descending order by review date.

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3	0	Samuel	Jackson	Actor	SPF	Active	30600	Avengers	Executive Vice President	Annual-Sup	09/22/2017	07/01/2016	06/30/2017	Exceptional Performance	09/30/2018
4	0	Robert	Downey Jr.	Actor	SPF	Active	30000	Avengers	Executive Vice President	Annual-Sup	10/04/2018	07/01/2017	06/30/2018	Exceptional Performance	09/30/2019
5	0	Scarlett	Johansson	Actor	CLS	Active	30600	Avengers	Executive Vice President	Probation	08/21/2018	01/01/2018	06/30/2018	Exceptional Performance	09/30/2019

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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	Last Rating	Next Review Date
1	0	Robert	Downey Jr.	Actor	SPF	Active	30600	Avengers	Executive Vice President	Annual-Sup	10/04/2018	07/01/2017	06/30/2018	Exceptional Performance	09/30/2019
2	0	Scarlett	Johansson	Actor	CLS	Active	30600	Avengers	Executive Vice President	Probation	08/21/2018	01/01/2018	06/30/2018	Exceptional Performance	09/30/2019
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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 or click on 'salary administration plan' to sort by employee type.)

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.

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

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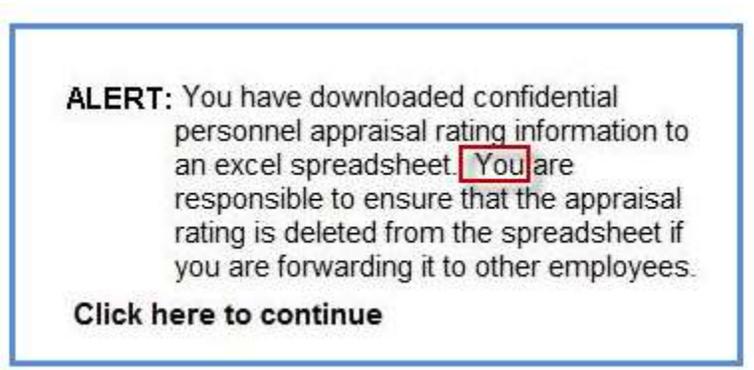
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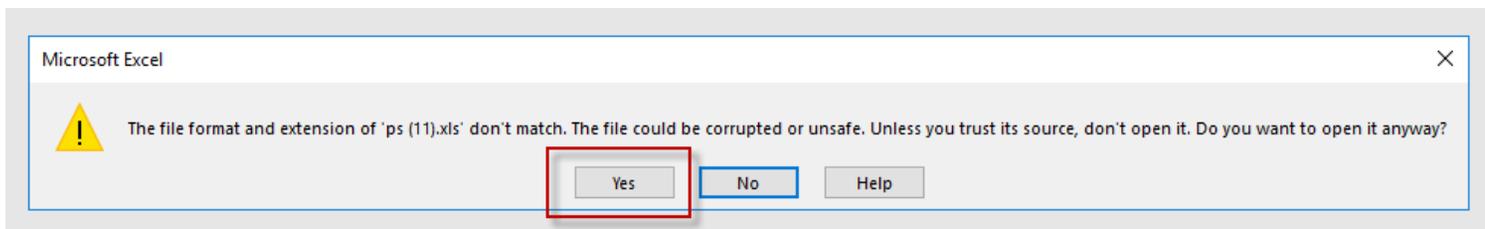
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Ratings are part of the personnel record and only those employees with an absolute need to know should have access to those. You acknowledge that alert when you click 'to continue' and the report will download with the ratings. Should you forward the information to other employees, those ratings will be shared unless you delete them.

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.



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.