STARTING PERFORMANCE REVIEW FOR AN ORGANIZATION
THIS GUIDE IS FOR: HR PARTNERS

HR staff with the **HR Partner** security role can initiate this task. It opens the performance review process for managers to begin reviewing their direct reports.

1. Once logged into Workday@OK, type **Start Performance Review for Organization** into the **Search** bar.
2. In the dialog box that appears, you will have options to run now or run at a future date. Select **OK**.
3. **Search** for the agency's top supervisory organization by name.
   Example: Office of Management and Enterprise Services (John Suter).
4. Check the box to **Include Subordinate Organizations**.
5. In the **Review Template** field, select the template that reflects the correct template period **(beginning year, mid-year, and year-end).**
6. Enter the start and end date for the template period. **Warning**: The start date must be after the previous template period has closed. If the template periods overlap, the responsibilities and their weights and the competency weights will not carry over.
   Example:
   - Beginning year template: 07/1/2024 – 11/30/2024
   - Mid-year template: 12/1/2024 – 5/31/2025
   - Year-end template: 6/1/2025 – 6/30/2025
7. If your agency elects to do calibration on mid-year or year-end templates, select the calibration program by selecting **All** and **Performance Calibration. NOTE:** The calibration program cannot be added after the template has been started.
8. Select **OK.**

Once complete, all managers with eligible employees will receive an inbox task that will allow them to start the performance review process for their employees. Managers will not receive a Workday@OK inbox item for employees who already have a review template in progress.

Pro Tip: Before starting a performance review template, run **RPT00205 - Employee Performance Reviews by Review Template** to identify any open performance reviews that need to be closed or canceled before starting performance reviews for an organization.