How to Copy a Performance Task


HR Training Materials > Connector: [https://www.tbr.edu/hr/training-materials-hr-officers](https://www.tbr.edu/hr/training-materials-hr-officers)

Click on Admin > Performance

Under Performance Reviews, click on Tasks
Task Template

❖ Select the desired Performance Template and Click **Copy** under Options

General

❖ Change and customize the task name, add a description, and instructions if applicable
Date Criteria

❖ Enter the task period
❖ Enter date when entire review is due

Example below: The task will launch on 5/1/19 and can be assigned to employees through 5/31/19. The entire review is due on 7/1/19.

Assignment Criteria

Example below: All reviews will be assigned at the beginning of the Task Period > 5/1/19.

Review Period

❖ Enter the period that will be reviewed
Availability

❖ Add the group, positions, users, etc. that will be receiving this task
❖ Subordinates: Check if subordinates should also receive the review

Admin Visibility

❖ Who will be able to view and edit this task
❖ Add your institution, a group, user, etc.

Ratings Display and Overall Rating Scale

❖ Select how the ratings should display
❖ Edit the overall rating scale if necessary
❖ Check or uncheck if attachments may be attached to the review
❖ Delete or click on the + to add employee information from the user profile > Next
Review Workflow

Review Steps

❖ Add or Remove steps
❖ Review Sequence order

❖ Click on the calendar to Define date criteria
❖ Enter a due date for each step. Example: The Goal Progress and Planning step is due on 5/15/19.
- Click on **Edit** to view the sections for each step
- Edit the Step Title as needed
- Click + to add a section or the trash can to delete a section
- In this example, the Goal Progress and Planning has been assigned to “Self” (employee)
- Two sections have been added and the employee will be able to add comments and edit each section
- The weight is set to 0% as the sections will not impact the overall rating

![Image](image_url)

- **Select Sections and click on Done**

![Image](image_url)
E-Mail Administration

❖ Select the e-mail setting for each step > Save

❖ Review all the steps and sequence numbers
❖ Click on Next

Review Summary

❖ Select if a Confirmation Page should display when users complete a step
❖ Enter the text you would like to display to end users > Next
Visibility

- Specify which sections are visible to Reviewee (Employee)
- Select options to display (Ratings/comments)
- Date visible to Reviewee

Click on **Edit** to specify when a section should be visible to employee

- Example: If the Overall Rating should be visible upon completion of the Manager’s review, select visible 0 days after Manager Review

**Note:** Indirect Manager Review (If applicable)

- Uncheck Visible to Reviewee if the employee should **not** view the Indirect Manager’s ratings or comments.

  **Note:** Comments made to the goal sections > Are visible to reviewee.
Overall Rating

- Indicate when the Overall Rating will be visible to the reviewee and click Next

Confirm

- Confirm and preview all steps
- Click on Preview to preview how each section will appear

Click on Get Started to preview the entire section
- Click **Save** to save the task

### Accessing the saved Task

- Go to Admin, Performance, Tasks (Under Performance Reviews)
- Check **Active** to activate the Task
- You may edit, delete, view/add/remove users
- Dynamically assigned: Tasks that will automatically launch at a certain time such as when an employee is assigned to a position, new hire, etc. (May not be applicable to annual reviews)
- **Note:** You may only delete tasks that have not yet been started. Only basic edits are allowed after the task has launched (task name, instructions, add users, etc.)