

PERFORMANCE ACCOUNTABILITY & FEEDBACK

Quarterly Agency Condensed Report

Everyone who has the **HR Analyst role** in Workday will have access to run the condensed report for their agency.

Report name: CHRO WFD | Performance, Accountability & Feedback (All Phases) - Current Quarter Only

Important Information about this Report

This report only pulls data for the current quarter.

The PAF reports are dynamic in nature. This means the completion numbers can change within a small window of time. As a result, any statewide quarterly reports sent out by DAS – CHRO may not reflect the current numbers an agency will see in the system or other PAF reports. DAS – CHRO will run the statewide quarterly report at 11:30pm on the last day of the reporting period (January 31, April 30, July 31, and October 31 each year) to calculate the statewide summary report.

The quarter date range columns on the report only look to see if a check-in was completed **NOT if the manager needs to complete the check-in for that particular quarter**. A manual check needs to be completed to determine the 12-month check-in cycle for each employee based on the manager or employees hire date.

Most recent hire date is the field used to determine whether an employee or a manager is in a grace period.

If an employee has multiple managers assigned to them in Workday, the report will look at the most recent hire date of all the managers and if any of the managers most recent hire date falls within the quarter then all those managers are in a grace period. The report does this because there is no way to determine which manager is responsible for completing the check-in. Therefore, it is up to the agency to determine how they will handle these situations.

Check-ins must be performed by a manager that is currently in the employee's management chain in Workday. If a manager does a check-in with the employee and then changes position out of the employees management chain during the quarter, the check-in will not show as being completed in the report.

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Employees or managers who are on leave are not excluded from the PAF reports. Due to the point-in-time nature of the data, the report does not examine the length of time an employee has been on leave. If an employee is on leave, a placeholder check-in can be created for compliance purposes.

If a manager has a vacant position, the position will not show up on the report until it is filled.

Employees who have another position as a board or commission member or who have a secondary volunteer position will not show up in this report or any other PAF report. Agencies can run the “AUD | Workers with Second or Third "Temporary" Positions” report to determine who those employees are.

Agencies who are not subject to ORS 240 are excluded from the report.

Temporary and seasonal employees are not included in the report.

Employees who are in Executive Service positions do not require check-ins.

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This section provides a description of the information contained in each column of the report when you export it to Excel.

| COLUMN NAME | COLUMN DESCRIPTION |
|--|---|
| Manager ID | This is the manager's employee ID number (OR#) |
| Supervisory Manager's Email | This is the manager's work email address. |
| Supervisory Manager | This is the manager's first and last name. |
| Supervisory Manager Position Start Date | This is the manager's start date for their current position. |
| Any Manager in Grace Period | If the field says 'Yes' then the manager's position start date fell between the quarter the report is checking for. If the field is blank, then the manger does not have the grace period. |
| Employee ID | This is the employee's employee ID number (OR#) |
| Employee | This is the employee's first and last name. |
| Employee Most Recent Position Start Date | This is the employee's start date for their current position. |
| Employee Supervisory Organization | This can be the employee's agency, division, program, or unit. |
| Employee Job Profile | This is the employee's job classification. |
| Employee Has Multiple Managers | <p>This column will show 'Yes' if there are multiple managers assigned to the employee. To see who is assigned, look at column 'All Worker's Manager(s)'. If it is blank then it means they only have one manager assigned.</p> <p>IMPORTANT: If you look at the report in Workday and an employee has multiple managers the first manager shows all the employee information, but the subsequent managers on an employee will appear as a blank line since all that employee's information is captured with the first manager. However, when you export the report to Excel it does populate the employee information for each manager. This is an oddity of how Workday visualizes the data on screen.</p> |

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| COLUMN NAME | COLUMN DESCRIPTION |
|--|--|
| All Worker's Manager(s) | The manager(s) name will display in this column. If the employee has multiple managers assigned to them all of them will be listed. |
| Employee Grace Period | If the field says 'Yes' then the employee's position start date fell between the quarter the report is checking for. If the field is blank, then the manger does not have a grace period to complete the check-in with the employee. |
| Current Quarter Date Range | This column name will vary based on the date range for the quarter. For instance, if the column name is 2023 August 1 – October 31, the report is showing any check-ins where the 'Planned For' date is between August 1 through October 31, 2023. These columns will always be named one of these date ranges: <ul style="list-style-type: none"> • [Year] February 1 – April 30 • [Year] May 1 – July 31 • [Year] August 1 – October 31 • [Year] November 1 – January 31 |
| Current Quarter Check-in Creator | This column name will vary based on the date range for the quarter. This column shows who created the check-in for the current quarter. |
| Date Next Quarterly Check-in Due Overall | If the manager or employee is in a grace period then this date should reflect a date outside the current quarter. If neither are in a grace period, then the date should reflect the last day of the current quarter (January 31, April 30, July 31, or October 31). |
| Date Report Run | This is the date the report was ran in Workday. |
| CF EMI Check-ins | These are dates for when someone created or edited the check-in. These dates are system generated. |