

PERFORMANCE ACCOUNTABILITY & FEEDBACK

Agency Detailed Report

Everyone who has the **HR Analyst role** in Workday will have access to run their agency's Performance Accountability and Feedback report.

Report name: CHRO WFD | Performance, Accountability & Feedback (All Phases) (New Version)

IMPORTANT INFORMATION ABOUT THIS REPORT

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.

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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12-MONTH FEEDBACK CYCLE FOR NEW SUPERVISORY MANAGERS

New supervisory managers begin their 12-month cycle the quarter after completing all the required training and yearly planning identified in the initial tasks as outlined in the [PAF Checklist](#).

The new supervisory manager's start date determines the 12-month feedback cycle. Use the table below to determine the initial quarter and then the 12-month feedback cycle.

Manager's Position Start Date <i>If the manager's position start date is between...</i>	Set Initial Performance Expectations & Goals <i>The manager will identify the performance expectations and goals, meet with the employee, and document them in a check-in by...</i>	Initial Observation Begins <i>The manager will monitor and observe employee performance during these months for their initial quarter.</i>	Conduct & Document Initial Check-in Meeting By <i>The manager to hold initial check-in meeting to discuss the employee's performance and document the check-in by.....</i>
October 1 – December 31	End of March	April – June	End of July
January 1 – March 31	End of June	July – September	End of October
April 1 – June 30	End of September	October – December	End of January
July 1 – September 31	End of December	January – March	End of April

12-MONTH FEEDBACK CYCLE FOR NEW EMPLOYEES

When a new employee is hired, the 12-month feedback cycle will be based on the employee's position start date. The manager will establish initial performance expectations and goals and meet with the employee to discuss them in the quarter the employee was hired.

Employee Position Start Date <i>If the employees position start date is between...</i>	Set Initial Performance Expectations & Goals <i>The manager will identify the performance expectations and goals, meet with the employee, and document them in a check-in by...</i>	Initial Observation Begins <i>The manager will monitor and observe employee performance during these months for their initial quarter.</i>	Conduct & Document Initial Check-in Meeting By <i>The manager to hold initial check-in meeting to discuss the employee's performance and document the check-in by...</i>
October 1 – December 31	End of December	January – March	End of April
January 1 – March 31	End of March	April – June	End of July
April 1 – June 30	End of June	July – September	End of October
July 1 – September 31	End of September	October – December	End of January

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REPORT COLUMN DESCRIPTION

This section provides a description of the information contained in each column of the report.

COLUMN NAME	COLUMN DESCRIPTION
Supervisory Manager's ID	This is the supervisory manager's employee ID number (OR#)
Supervisory Manager	This is the supervisory manager's first and last name.
Supervisory Manager's Company	This is the supervisory manager's agency.
Supervisory Manager's Email	This is the supervisory manager's email address.
Supervisory Manager's Job Profiles	This is the supervisory manager's job classification.
Supervisory Manager's Most Recent Job Profile	This is the supervisory manager's current job classification. This would be different if they are in a work out of class, developmental, or rotational position.
Supervisory Manager's Most Recent Union	This is the supervisory manager's current union. This would be different if they are in a work out of class, developmental, or rotational position.
Supervisory Manager's City	This is the supervisory manager's work location city.
Position Assigned to Supervisory Manager	This is the supervisory manager's current position.
Supervisory Manager Position Start Date	This is the supervisory 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 a grace period. See the '12-Month Feedback Cycle' on page 3 of this document.
Date Next Check in Should Occur - Manager	If the field has a date, then the manager will need to complete the required training and check-ins by the date listed. If the field is blank, then the manger does not have a grace period. See the '12-Month Feedback Cycle' on page 3 of this document.

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COLUMN NAME	COLUMN DESCRIPTION
Supervisory Manager On WOC	If the manager is in a work out of class this field will display 'Yes'. If they aren't in a work out of class, the field will be blank.
Supervisory Manager On Developmental/Rotation	If the manager is in a developmental or rotation this field will display 'Yes'. If they aren't in a developmental or rotation, the field will be blank.
PAF Module 1 Completed	If the supervisory manager completed the first online training module this field will display 'Yes'. If not, then the field will be blank.
PAF Module 2 Completed	If the supervisory manager completed the second online training module this field will display 'Yes'. If not, then the field will be blank.
PAF Module 3 Completed	If the supervisory manager completed the third online training module this field will display 'Yes'. If not, then the field will be blank.
PAF Virtual Classroom Session Completed	If the supervisory manager completed the virtual classroom session this field will display 'Yes'. If not, then the field will be blank.
Employee ID	This is the employee's employee ID number (OR#)
Employee	This is the employee's first and last name.
Company	This is the employee's agency.
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 Most Recent Position Start Date	This is the employee's start date for their current position.
Employee Has Multiple Managers	This column will show 'Yes' if there are multiple managers assigned to the employee. To see who is assigned, look at column W 'All Worker's Manager(s)'. If it is blank then it means they only have one manager assigned.
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.

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COLUMN NAME	COLUMN DESCRIPTION
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.
Date Next Check in Should Occur - Employee	If the field has a date, then the manager will need to complete the check-in by the date listed. If the field is blank, then the manger does not have a grace period to complete the check-in with the employee.
Employee Primary Position ID	This is the employee's position ID number for their primary position. This would be different if they are in a work out of class, developmental, or rotational position.
Employee Union for Primary Position	This is the employee's representation (REPR) for their primary position.
Employee's Most Recent Union	This is the employee's representation (REPR).
Union on Position (if Filled)	This is the position's representation (REPR) if filled.
Union on Position (if Vacant)	This is the position's representation (REPR) if vacant.
Union for Subordinate Position or Employee	This is the position's representation (REPR) if vacant or if it is filled, it's the representation for the employee.
Employee On Leave	If the employee is out on any type of leave (i.e., FMLA, OFLA, etc.) this field will display 'Yes'. If they aren't on leave, the field will be blank.
Is the Employee in a work out of class?	If the employee is in a work out of class, this field will display 'Yes'. If they aren't in a work out of class, the field will be blank.
Is the Employee in a Developmental/Rotation?	If the employee is in a developmental or rotation this field will display 'Yes'. If they aren't in a developmental or rotation, the field will be blank.

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COLUMN NAME	COLUMN DESCRIPTION
Quarter Date Range Column Name Varies <i>(These columns show the check-ins completed for the current and upcoming quarter)</i>	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
Quarter Date Range Column Name Varies (see above)	These columns show who created the check-in for that particular quarter because the report is looking at any check-ins created for the employee during the 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.