The “Employee Review Details” report provides data regarding the progress/completion status of goal setting, the alignment touch point and/or the year-end appraisal. The report can be run by:

- Managers (includes employees in their supervisory chain)
- HRBPs (includes employees in their assigned organizations)
- Performance Management (includes all employees)

**Tasks**

- Performance Report for Direct Reports Only
- Report for Multiple Supervisory Organizations
- Goal Report for Direct Reports Only
- Sort and Filter
- Export Report

**Performance Report for Direct Reports Only**

1. Click the **My Team’s Performance** app.

2. The report displays. To export to Excel, click the gear in the top right of the report. Select **Download to Excel**.

**Report for Multiple Supervisory Organizations**

Type “Employee Review Details” in the Workday search field. The following fields can be used to filter the report. Only the **Review Templates** field is required. A graphic of the nine filter options is below.
3. **Organizations:** Click the and select from the menu (My Organizations for managers). The organizations you have access to will be based on your security setup. Alternately, type your name in the field to find all your supervisory organizations. If you are a manager of only one supervisory organization, skip this.

4. **Employee Type:** Click the and select any combination of employee types.

5. **Include Subordinate Organizations:** Check or uncheck to include all organizations reporting through to this level or just this level.

6. **Transaction Status:** HR focused filters to find employees in various stages or routing options for employee reviews.

7. **Review Templates:** Choose between:
   a. **Active By Review Type:** Filter to the various stages of Performance from goal setting to year-end appraisal.
   b. **All Review Templates:** Filter to a specific template from any organization across UVA from goal setting to year-end appraisal.

Select which performance tasks to include in the report. Individual organizations may have their own tasks (Health System vs. Academic vs. Academic Probation vs. Advancement vs. Darden Pilot), and each has three types of tasks that together constitute the entire performance cycle for that organization. There are three types of tasks:

   c. **Goal Setting**, which includes two steps:
      i. Employee enters goals and submits
      ii. Manager approves goals

   d. **Goal Alignment Touchpoint** (optional for all, except Academic probationary employees), which includes two steps:
      i. Employee completes self-evaluation (on-track/off-track) and submits
      ii. Manager completes evaluation (on-track/off-track) and submits

   e. **Review**, which includes five steps:
      i. Employee completes self-evaluation and submits
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ii. Manager receives optional “Get Additional Manager Evaluation” task allowing them to request goal comments from another worker, ideal for dual-reporting relationships; can be submitted or skipped

iii. Manager completes evaluation and submits

iv. Manager’s manager approves evaluation (secondary review)

v. Manager receives evaluation for acknowledgment and submits to complete the process

8. **Review Period Start Date on or After:** Allows you to filter to templates launched on or after a specific date.

9. **Review Period Start Date on or After:** Completes the timebound filter to include performance templates completed within a timeframe.

10. **Year the Review Period Ended:** Type in the 4-digit (2019) performance year to filter to a specific year.

11. **Save a Filter:** Enter a title in the Filter Name field if you will run a report repeatedly. Once saved, Click on Saved Filters to run the saved report.

12. Click **OK.**
13. Click the **My Team’s Performance** app.

14. The reports display. Scroll down to the **My Direct Report’s Goals**. To export to Excel, click the gear in the top right of the report. Select **Download to Excel**.
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Sort and Filter

The resulting report will be large. If the report is extremely large, it may take time for Workday to process. Consider adding filters reviewed above. If the report is too large, the headers on the report will not produce filters when clicked. Consider using the filters reviewed above.

1. Click a header in the report. Sort by using the ↑ ↓ arrows.
2. Filter by clicking in the Value field and selection from all the values in that column. Select as many items as needed. Alternately, type the desired item in the Value field and repeat as often as needed.

Export Report

1. Click the Excel icon in the top right corner of the report to export to Excel for further manipulation.

Note: This report contains sensitive performance information (including ratings). Do not share the exported report without considering the appropriateness of providing visibility to this data to the recipient.