

Reports for Managers

Managers have access to a PM dashboard in Workday. Search “PM Dashboard” and in the Workday search bar, then click the **“Performance Management PM Dashboard”** link.

You can also separately track the completion of new hire goal setting, peer review, year-end performance tasks, and quarterly check-ins (quarterly PE process only) for your teams using these reports:

Performance Completion Report: Provides a detailed view of team member goal setting and performance evaluation statuses, ratings, and the managers and team members.

1. In Workday, type **“Performance Completion Report”** in the global search bar.
2. Prompt recommendations:
 - **Supervisory Org:** Leave blank or enter the name of a specific leader to narrow the report. Orgs with “JM” in the title include contingent workers.
 - **Review Templates:** Search the performance year (ex: “FY23” or “CY23”) and select the relevant performance template(s) (for new hire goal setting, search “goal setting” and select the relevant templates).
 - **Worker is Active?:** Recommend leaving checked.
3. Click **OK** to run.

Quarterly Performance Report (Performance Engagement Pilot Participants only): Provides a detailed view of manager responses to the questionnaires, including indirect reports. In Workday, type **“Manager Questionnaire Report”** in the global search bar.

Prompt recommendations:

- **Supervisory Org:** Leave blank or enter the name of a specific leader to narrow the report. Orgs with “JM” in the title include contingent workers.
- **Include Subordinate Orgs:** Check to see feedback for team members of your direct report managers (recommended). Leave it unchecked to see ONLY your direct reports or the direct reports of the specific leader selected in the Supervisory Org field.
- **Review Templates:** Search the “quarterly” and select the current year template.
- **Review Period Dates:** Leave blank to view all quarters. Or enter a specific time frame (e.g., if you only wanted to see Q1, enter 1/1/25 in the Start Date, and 3/31/25 in the End Date).
- **Worker is Active?:** Recommend leaving checked.

Click **OK** to run.

Feedback Activity – All Worker Requests: View feedback requests for team members or managers for the Nursing Peer Review process (shows statuses only; run the [My Team's Feedback](#) report below to view feedback comments).

1. In Workday, type “**Feedback Activity – All Worker Requests**” in the global search bar.
2. Prompt recommendations:
 - **Date Initiated On or After:** Enter the earliest date feedback requests may have been sent. Consider using the beginning of the performance cycle. FOR NURSE PEER REVIEW: Leave blank.
 - **Date Initiated On or Before:** Enter the last date a request may have been sent. Leave blank for today's date.
 - **Job Requires RN License:** Critical for Nurse Managers for Magnet status. Check to review only registered nurses in all settings.
 - **Supervisory Org:** Leave blank or enter the name of a specific leader to narrow the report. Orgs with “JM” in the title include contingent workers.
 - **Include Subordinate Orgs:** Check to see feedback for team members of your direct report managers (recommended). Leave it unchecked to see ONLY your direct reports or the direct reports of the specific leader selected in the Supervisory Org field.
3. Click **OK** to run.

My Team's Feedback: View feedback entered for each of your team members.

1. In Workday, type “**My Team's Feedback**” in the global search bar.
2. Prompt recommendations:
 - **Select Worker:** Leave blank. The report automatically includes your supervisory organizations.
 - **Feedback Start Date:** Enter the start date of the performance cycle to eliminate the previous year's feedback. Leave **End Date** blank.
 - **Include Workers W/out Feedback:** Optional.
 - **Feedback From:** Select include feedback submitted to specific workers.
3. Click **OK** to run.

Feedback Report for HRBPs

HRBPs can run this report to view detailed feedback for any supervisory organization at UVA.

1. Type “**All Worker Feedback Information**” in the Workday global search.
2. Prompt recommendations:



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- **Company:** Select an entity to include only those workers.
- **Include Workers Without Feedback:** Optional
- **Worker:** Optional. Enter a name(s) to include only those entered.
- **Job Profile, Job Family Group, Job Family:** Optional. Use to filter to workers in in specific roles or similar role groups.
- **Supervisory Organization:** Check to include all employees in the supervisory chain of the leader entered above.
- **Location:** Enter a building name or address to include all employees of that location.
- **Created Moment is On or After:** Enter a date to view feedback entered on or after the date entered. Typically, the beginning of the performance year.
- **Certification:** Enter a certification title to view feedback provided to anyone with that certification.
- **Workers Job Profile requires RN license:** Check to include RNs for nurse peer review tracking support.
- **Worker's Job Profile is on the CCL:** Check to include only clinical ladder nurses.

3. Click **OK** to run.