



HRIS Job Role Training

Review Training

Forms: PA26, ZM90

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Introduction

HRIS has the ability to schedule employee performance reviews.

At the time of hire the review period is set up on the *Review (PA26.1)* form. When the review is complete, the score is entered on the *Review (ZM90.1)* form. Then the next review period is setup on the *Review (PA26.1)* form.



Notes

- The ZM90.1 form will be used to enter completed employee evaluation information and will be used in conjunction with the PA26.1 form.
- A review record must be created on the PA26.1 before a review record can be created on the ZM90.1
- Currently the State of Arizona is using (at a minimum) the following fields on the PA26.1 form: Company, Employee, Scheduled Date, Review Type, and Next Review Date (or Review Schedule - if applicable).
- Once the initial performance review is setup, you are ready for the first and following reviews. Each time you complete the form and click Add, a new review record is added to the employee's review history.
- When a completed review is sent to the agency's Human Resources office, the information on the review (full date range, type of review, score) will be entered on the ZM90.1 form.
- Before completing the review process, you should ensure the following:
 - Verify you have proper signatures on all paperwork.
 - Verify that the initial review is set up at the time the new hire action is keyed. See Review Form information in New Hire Training under the Agency HR Initiator.
- On the PA26.1 form the Scheduled Date is the end date of the review period (i.e., if the date range is 02/01/03 - 01/31/04 then the Scheduled Date would be 01/31/04). The Review Date is the date when the review is given to the employee. If the Review Date is left blank, the Scheduled Date will default into the field.
- Enter date range, type of review, and total score on the ZM90.1 form.
- If you delete a review record on the PA26.1, the corresponding review record on the ZM90.1 will be deleted also. However, if you delete the ZM90.1 review record **first**, the corresponding PA26.1 review record **will not** be deleted. You will have to go to the PA26.1 form and delete the review record yourself.

Performance Review Type Definitions

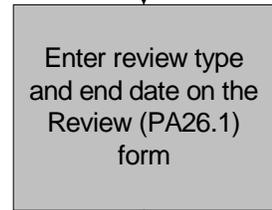
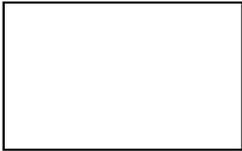
Review Type	Review Description	When to use Review Type
ANNUAL	ANNUAL EVALUATION	Evaluation at the end of an annual cycle
CARRYOVER	CARRY OVER PREV RATING	Score brought over from previous rating period which ended 60 days from the current review period
CLOSE OUT	CLOSE OUT EVALUATION	Evaluation done when an employee or supervisor leaves prior to the rating period ending
INITIAL	INITIAL REVIEW SETUP	Planner is written and discussed with employee
MERIT	MERIT EVALUATION	Evaluation with merit guidelines
OP EXTEND	ORIG PROB EXTENSION	Extension of original probation due to a below standard score
ORIG PROB	ORIG PROBATION EVALUATION	Review completed on an original probation employee to show a score which will signify whether the employee met expectations or fell below standard for the review period. This score determines the need for a status change to move the employee to a permanent status.
PP EXTEND	PROMO PROB EXTENSION	Extension of promotional probation due to a below standard score
PROMOPROB	PROMOTION PROBATION EVAL	Review completed on a promotional probation employee to show a score which will signify whether the employee met expectations or fell below standard for the review period. This score determines the need for a status change to move the employee to a permanent status.
SPEC EVAL	SPECIAL EVALUATION	Evaluation done mid cycle if employee has fallen below standard
UC EVAL	UNCOVERED EVALUATION	Evaluation done on an uncovered employee
UC MRT N/E	UNCOVERED MERIT NO EVAL	Merit for an uncovered employee without the use of an evaluation
UC MRT W/E	UNCOVERED MERIT W/EVAL	Merit for an uncovered employee with the use of an evaluation

Review Process

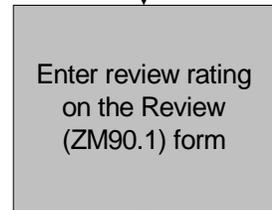
Required forms appear as:



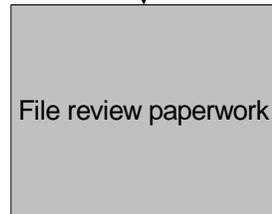
Optional forms appear as:



See Review Form (PA26.1) (Page 5)



See Review Form (ZM90.1) (Page 7)



Review Form (PA26.1)

The screenshot displays the HRIS State of Arizona interface for the Review Form (PA26.1). The page includes a header with the HRIS logo, a navigation menu, and a main form area with various input fields and a comments section. Numbered callouts (1-13) point to specific elements:

- 1: Search bar containing 'pa26'.
- 2: Company input field.
- 3: Employee input field.
- 4: Inquire button in the navigation menu.
- 5: Scheduled Date input field.
- 6: Review Type input field.
- 7: Review Date input field.
- 8: Overall Rating input field.
- 9: Reviewed by input field.
- 10: Next Review Date input field.
- 11: Next Review Type input field.
- 12: Comments button.
- 13: Review (PA26.1) title.

Navigation menu: Home, Inbasket, Add, Change, Delete, Previous, Inquire, Next, Inquire, Related Forms.

Form fields:

- Company:
- Employee:
- Scheduled Date:
- Review Type:
- Review Date:
- Overall Rating:
- Reviewed by:
- Review Schedule:
- Next Review Date:
- Next Review Type:

Comments:

Footer: Done, Internet, 100%

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	White Search Box	R	Type PA26.1 in the white search box. Press <i>Enter</i> on the keyboard.	The Review (PA26.1) form will open.	
2	Company field	R	Type 1 in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
3	Employee field	R	Type the employee's EIN.		Ensure the correct EIN is keyed.
4	Inquire button	R	Click Inquire.	The system will access appropriate information for the EIN.	
5	Scheduled Date field	R	Type the appropriate date of the review.		Date must be in the format of MMDDYY. This date is the end date of the review period.
6	Review Type field	R	Type or select from the drop down menu the type of review being performed.		
7	Review Date field	O	In the Review Date field, type in the date the review was given to the employee.		Date must be in the format of MMDDYY. If this field is left blank, it will default to the Scheduled Date.
8	Overall Rating field	R	Leave this field blank. It is for display only.		The rating is entered on the Review (ZM90.1) form.
9	Reviewed By field	O	Type or select from the drop down menu the EIN of the employee's reviewer.	The reviewer's name will be displayed.	
10	Review Schedule field	O	Type or select from the drop down menu the value that indicates the frequency of the next review.		
11	Next Review Date field	O	Type the date of the employee's next review.		Date must be in the format of MMDDYY. If left blank this field will be calculated based on the value entered in the Review Schedule.
12	Next Review Type field	O	Type or select from the drop down menu the next review type for the employee.		
13	Add button	R	Click Add.	You will see a message in the lower left corner "Add Complete - Continue".	Review for employee is completed.

Review Form (ZM90.1)

The screenshot displays the HRIS State of Arizona interface for the Review Form (ZM90.1). The page includes a header with the HRIS logo and the text "Welcome Leslie [logout]". A search bar contains the text "zm90". Below the header is a navigation menu with buttons for "Add", "Change", "Delete", "Previous", "Inquire", "Next", and "Inquire". A left sidebar contains "Home" and "Inbasket" links. The main content area features several input fields: "Company", "Employee", "Review Period" (with a "To" field), "Review Type", "Process Level", "Job Code", "Position", and "Overall Performance Management Rating". Eight numbered callouts (1-8) point to specific elements: 1 points to the search bar, 2 to the Company field, 3 to the Employee field, 4 to the Review Period field, 5 to the Review Type field, 6 to the Process Level, Job Code, and Position fields, 7 to the Overall Performance Management Rating field, and 8 to the Inbasket link in the sidebar. The Windows taskbar at the bottom shows "Done", "Internet", and "100%" zoom.

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	White Search Box	R	Type ZM90.1 in the white search box. Press <i>Enter</i> on the keyboard.	The Review (ZM90.1) form will open.	A review record must be created on the PA26.1 before a review record can be created on the ZM90.1.
2	Company field	R	Type 1 in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
3	Employee field	R	Type the employee's EIN.	System will access information for that EIN.	
4	Review Period field	R	Type or select from the drop down menu the beginning and ending date of the review period.		Dates must be in the format of MMDDYY. The end date of the review period must match the Scheduled Date on the Review (PA26.1) form.
5	Review Type field	R	Type or select from the drop down menu the type of review being performed.		
6	Process Level field Job Code field Position field	N / A	NO ENTRY REQUIRED		These fields will display the applicable information for the employee when the 'Add/Change' button is clicked.
7	Overall Performance Management Rating field	R	Type in the performance review total rating.		Rating must be in the format of X.XX Ratings range from 0.00 (No Score) to 5.00 (Exceptional).
8	Add button	R	Click Add	You will see a message in the lower left corner "Add Complete - Continue".	Review for employee is completed. The Process Level, Job Code and Position will appear.

Delete a Review (PA26.1)

The screenshot shows the HRIS State of Arizona interface for reviewing a record (PA26.1). The interface includes a top navigation bar with the HRIS logo, the title "Review (PA26.1)", and a search bar containing "pa26". A navigation menu below the title contains buttons for "Add", "Change", "Delete", "Previous", "Inquire", and "Next". The "Delete" button is highlighted with a callout box labeled "6".

On the left side, there is a sidebar with "Home" and "Inbasket" options. The main content area contains a form with the following fields:

- Company**: A dropdown menu with a callout box labeled "2".
- Employee**: A text input field with a callout box labeled "3".
- Scheduled Date**: A date input field with a callout box labeled "4".
- Review Type**: A dropdown menu.
- Review Date**: A date input field.
- Overall Rating**: A section with a "Reviewed by" field containing three input boxes.
- Review Schedule**: A dropdown menu.
- Next Review Date**: A date input field.
- Next Review Type**: A dropdown menu.

A "Comments" button is located at the bottom of the form. A callout box labeled "5" points to the "Inquire" button in the navigation menu. The top right corner shows "Welcome Leslie" and a "[logout]" link. The bottom status bar displays "Done", "Internet", and "100%".

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	White Search Box	R	Type PA26.1 in the white search box. Press <i>Enter</i> on the keyboard.	The Review (PA26.1) form will open.	
2	Company field	R	Type 1 in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
3	Employee field	R	Type the employee's EIN.	System will access information for that EIN.	
4	Scheduled Date field	R	Type or select from the drop down menu the scheduled date of the review you want to delete.		Date must be in the format of MMDDYY. This date is the end date of the review period.
5	Inquire button	R	Click Inquire.	The review record will display.	 Make sure this is the record you want to delete BEFORE proceeding to the next step. If there is a corresponding ZM90 record it will be deleted also.
6	Delete button	R	Click Delete.	You will see a message in the lower left corner "Records Have Been Deleted".	

Delete a Review (ZM90.1)

The screenshot shows the HRIS State of Arizona interface for 'Review (ZM90.1)'. The top navigation bar includes 'Home', 'Inbasket', and a menu with '+ Add', 'Change', '- Delete', 'Previous', '? Inquire', 'Next', and 'Inquire'. A search bar contains 'zm90' and is labeled '1'. The main form area has several fields: 'Company' (labeled '2'), 'Employee' (labeled '3'), 'Review Period' (labeled '4') with a 'To' field, 'Review Type', 'Process Level', 'Job Code', and 'Position'. An 'Overall Performance Management Rating' field is at the bottom. A '6' callout points to the 'Delete' button. A '5' callout points to the '? Inquire' button. The bottom status bar shows 'Done', 'Internet', and '100%'.

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	White Search Box	R	Type ZM90.1 in the white search box. Press <i>Enter</i> on the keyboard.	The Review (ZM90.1) form will open.	
2	Company field	R	Type 1 in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
3	Employee field	R	Type the employee's EIN.	System will access information for that EIN.	
4	Review Period field	R	Type the beginning and ending dates of the Review Period you want to delete.		Dates must be in the format of MMDDYY.
5	Inquire button	R	Click Inquire.	The review record will display.	Make sure this is the record you want to delete BEFORE proceeding to the next step.
6	Delete button	R	Click Delete.	You will see a message in the lower left corner "Records Have Been Deleted".	 If a record is deleted from ZM90.1, you must delete the corresponding record on PA26.1. It will not be deleted automatically.