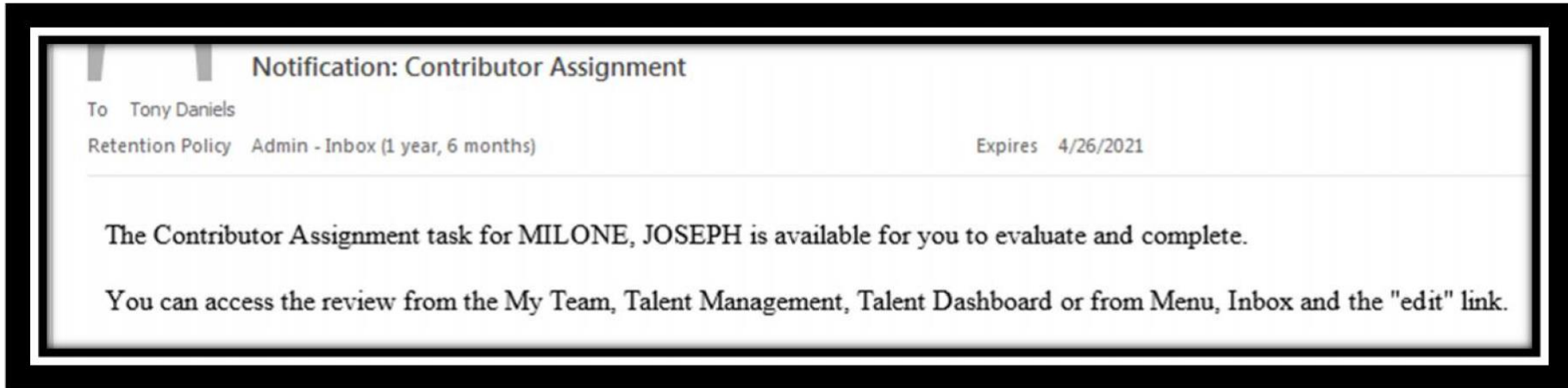


Ulti-Pro – Employee Review – Step Sheet

When an Employee Review is distributed in Ulti-Pro, the system will send an email to the supervisor email account that is listed in Ulti-Pro. An email sample is below.



To complete the employee review, Login to Ulti-Pro at <https://e13.ultipro.com> and follow the steps listed below

Employee Review Entry Steps

- 1) From the home page, you should see the To Do option with a number next to it. Select To Do to take you to the same location detailed in the supervisor email



2) In the Inbox -> Requests, select the edit link next to the employee name that you want to select for review.

The screenshot shows a web interface for managing requests. At the top, there are tabs for 'Inbox' and 'Out of Office'. The main heading is 'Requests'. Below this, there is a filter dropdown set to 'To do'. A search bar allows filtering by 'Initiated date range' from '01/01/1900' to '10/24/2019'. The text 'Filtered by Initiated date range is between 01/01/1900 and 10/24/2019 [Clear Filters]' is displayed below the search bar. On the right, there are 'print' and 'help' icons, and the text 'Displaying all records'. The main content is a table with columns for 'Initiated', 'Type', 'Description', 'Priority', 'For', 'By', 'Approval', 'Status', and 'Update'. The first row of data shows a request initiated on '10/24/2019 9:31:18 AM' by 'ANTHONY J DANIELS' for 'JOSEPH MILONE', with a status of 'Incomplete'. A red arrow points to the 'Update' link in the 'Status' column of this row.

Initiated	Type	Description	Priority	For	By	Approval	Status	Update
10/24/2019 9:31:18 AM	Employee	AHRC DSP Test 102419	Normal	JOSEPH MILONE	ANTHONY J DANIELS	Manager Additional Contributor Feedback Selection	Incomplete	Edit

- 3) Click the **Start** button next to Competencies and begin that section of the review.
 - a. The system will track the completion of each section and will not allow you to submit a review that is not completed


AHRC DSP Test 102419
JOSEPH MILONE, Asst Dir - AHRC [Employee Notes](#)
Effective Date 11/01/2019

Please make use of the OPWDD DSP Annual Evaluation Guidelines when completing this review.

Contributors

ANTHONY J DANIELS Due Date 10/25/2019 → JOSEPH MILONE Due Date 10/26/2019 → BARRY R DONOWITZ Due Date 10/28/2019

Review sections

	Manager/Additional Contributors Rating	
Competencies	—	 Start
Developmental Comments	N/A	Start
Overall Comments	N/A	Start
Final Score	—	

- 4) Select an employee rating score for each of the 62 questions from the pull-down menu.
 - a. Add a comment as need for a question

- 5) Choose **Save** every few minutes as you answer the questions. Choose **Save & Close** to close the section, or to close the review to return to complete it at a later time
- All 62 questions must be scored to complete the section.

AHRC DSP Test 102419

JOSEPH MILONE - Competencies

Use of 'Not Applicable' is limited and must be documented in the comments section for that specific review question.
Rating Scale [DSP Core Rating Scale](#)

1. **G01-A01** Competency Weight: 2%
Demonstrates respect for all individuals being supported

[Show details](#)

[Notes](#)

No comments are available.

JOSEPH MILONE, Employee

ANTHONY J DANIELS, Manager

Add your comments

6) Once the competencies section is completed

- a. Notice the Manager Rating is listed and the Competencies section has a green check mark with a Completed notation
- b. Select the **Start** button for Developmental Comments and enter a comment, choose save & close. A comment is required to complete the section
- c. Select the **Start** button for Overall Comments and enter a comment, choose save & close. A comment is required to complete the section

AHRC DSP Test 102419
JOSEPH MILONE, Asst Dir - AHRC [Employee Notes](#)
Effective Date 11/01/2019

Please make use of the OPWDD DSP Annual Evaluation Guidelines when completing this review.

Contributors

ANTHONY J DANIELS Due Date 10/25/2019 → JOSEPH MILONE Due Date 10/26/2019 → BARRY R DONOWITZ Due Date 10/28/2019

Review sections

✓ Competencies Completed	Manager/Additional Contributors Rating 2.24 - Meets Skill Standard	<input type="button" value="Edit"/>
Developmental Comments	N/A	<input type="button" value="Start"/>
Overall Comments	N/A	<input type="button" value="Start"/>
Final Score	2.24 - Meets Skill Standard	

- 7) Once the review sections are completed the **Send** to next contributor (employee) will be available
- a. If needed, add a Routing Comment Select Save and then choose **Send**

The screenshot displays a 'Review Summary' page with a table of review items. The table has three columns: the item name, the rating, and an 'Edit' button. Below the table is a 'Send' section with a radio button selected for 'Send forward to JOSEPH MILONE'. A red arrow points to a green 'Send' button in this section.

	Rating	
✔ Competencies Completed	2.24 - Meets Skill Standard	Edit
Developmental Comments	N/A	Edit
Overall Comments	N/A	Edit
Final Score	2.24 - Meets Skill Standard	

Send

Send to the next contributor.

Send **forward** to JOSEPH MILONE

Routing Comments

These comments will not appear on the final review and are visible to all review contributors.

Test

back | print full review | help

- 8) Once the employee has finished viewing the review they can comment, save it, and send it back. It will then appear back in the Inbox of the Supervisor
- a. The supervisor will click the edit button to open the review
 - i. If needed, the review can still be edited and resent to the employee for another review.

Requests

Requests
To do

Find by From To

Filtered by [\[Clear Filters\]](#)

Displaying all records

				Initiated		Status		
Initiated	Type	Description	Priority ▲	For	By	Approval	Update	▼
10/24/2019 9:31:18 AM	Employee	AHRC DSP Test 102419	Normal	JOSEPH MILONE	ANTHONY J DANIELS	Manager Re-assessment	Incomplete	Edit

9) If there is no further editing to be completed the supervisor adds a routing comment and clicks **Send**, to send it to the next the manager

The screenshot displays a 'Review Summary' page with a green header bar containing 'Inbox' and 'Out of Office' tabs. Below the header, there are navigation icons for 'back', 'print full review', and 'help'. The main content area features a table with the following rows:

Competencies Completed	2.24 - Meets Skill Standard	Edit
Developmental Comments	N/A	Edit
Overall Comments	N/A	Edit
Final Score	2.24 - Meets Skill Standard	

Below the table is a 'Send' section with the text 'Send to the next contributor.' and a radio button selected for 'Send forward to BARRY R DONOWITZ'. A red arrow points to the 'Send' button in this section. Below that is a 'Routing Comments' section with the text 'These comments will not appear on the final review and are visible to all review contributors.' and an empty text input field. A red arrow points to the 'Routing Comments' label.

10) The manager will receive an email, access the review, add comments, save and submit

11) The review will then appear back in the Inbox of the supervisor

12) The supervisor will click the submit button to finalize the review, it will then load the employee job review record in Ulti-Pro