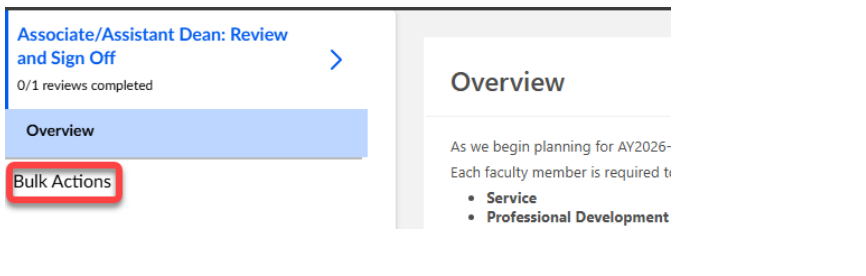


# Reopening a Step

## Instructions on Reopening a Step (Associate/assistant dean and Faculty)

### Reopen a Task and Return It to a Faculty Member

A task can be reopened and returned to one or more faculty members to make necessary updates.

|                                                                                           |                                                                                    |
|-------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
| <p><b>Open</b> the task for the direct report that needs to be reopened and returned.</p> |  |
| <p>Click <b>Bulk Actions</b>.</p>                                                         |  |

#### Bulk Actions:

- Under **Assigned Step**, click the **drop-down arrow** and select the step to reopen.
- Select the **check box** for one or more employees.
  - Only select multiple employees if the reason for reopening the step is the same.
  - Otherwise, reopen one employee's task at a time.
- Click **Reopen Step**.
  - The **Reopen Step** window opens.

#### Bulk Actions

Reopen Sign Off Submit

Select Review Steps you would like to reopen in bulk. Please note that only 1 step type can be reopened at a time.

Assigned step 1

Completed step

Search

Faculty: Create... 2

All completed steps

Search by name

Search

1 of 1 Selected Show Selected Reviewees

3

Reopen Step

| <input checked="" type="checkbox"/> | ↑↓ Name                                                                                              | ↑↓ User ID | ↑↓ Step Assigned | ↑↓ Step Assigned To | ↑↓ Reopened | Reopened Due Date | Comments |
|-------------------------------------|------------------------------------------------------------------------------------------------------|------------|------------------|---------------------|-------------|-------------------|----------|
| <input checked="" type="checkbox"/> | Faculty: Create Objectives. Meet, Discuss with Assoc/Asst Dean Objectives & Serv Credits, & Sign Off |            |                  |                     | No          |                   |          |

4. Click the **Calendar** icon and select a due date for the reopened step to be completed and returned.
5. In the **Comment for Reviewer** field, enter the reason for reopening the step.
  - The faculty member can view this comment when the task is reopened.
6. Click **Reopen Step**.

Reopen Step ✕

Are you sure you want to reopen Faculty: Create Objectives, Meet, Discuss with Assoc/Asst Dean Objectives & Serv Credits, & Sign Off step for 1 reviewee?

The current step will be closed and will not be available to you until the Faculty: Create Objectives, Meet, Discuss with Assoc/Asst Dean Objectives & Serv Credits, & Sign Off step is submitted. Please select the new due date for Faculty: Create Objectives, Meet, Discuss with Assoc/Asst Dean Objectives & Serv Credits, & Sign Off step.

Faculty: Create Objectives, Meet, Discuss with Assoc/Asst Dean Objectives & Serv Credits, & Sign Off due date

M/D/Y 4

Comment for reviewer 5

0 / 1000

6

A confirmation message indicates the step was successfully reopened. Click **Close**.



**You successfully reopened Faculty: Create Objectives, Meet, Discuss with Assoc/Asst Dean Objectives & Serv Credits, & Sign Off step for 1 reviewee!**

**IMPORTANT:** If a task is reopened and returned to a faculty member, it is temporarily removed from the associate/assistant dean's queue.

The task reappears after the faculty member completes the requested updates and resubmits it.

If an associate/assistant dean manages multiple faculty members, reviews for other faculty members remain visible unless those tasks have also been reopened.

## Emails:

An email is automatically sent to the faculty member when the review is reopened.

When the faculty member resubmits the task, an email is automatically sent to the associate/assistant dean with the subject line **"Performance Review Assigned to Manager"** followed by the faculty member's name.

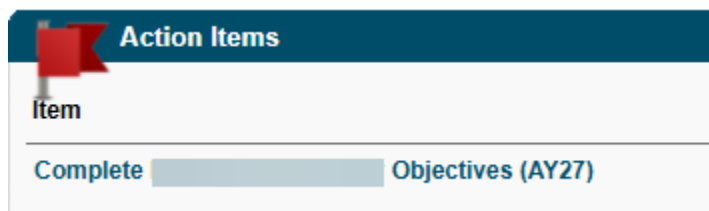
This email notifies the associate/assistant dean that the review is ready for review and action.

# Reopen, Resubmit, and Return a Task to Assoc/Asst Dean

After the associate/assistant dean reopens the task, an email is automatically sent to the faculty member.

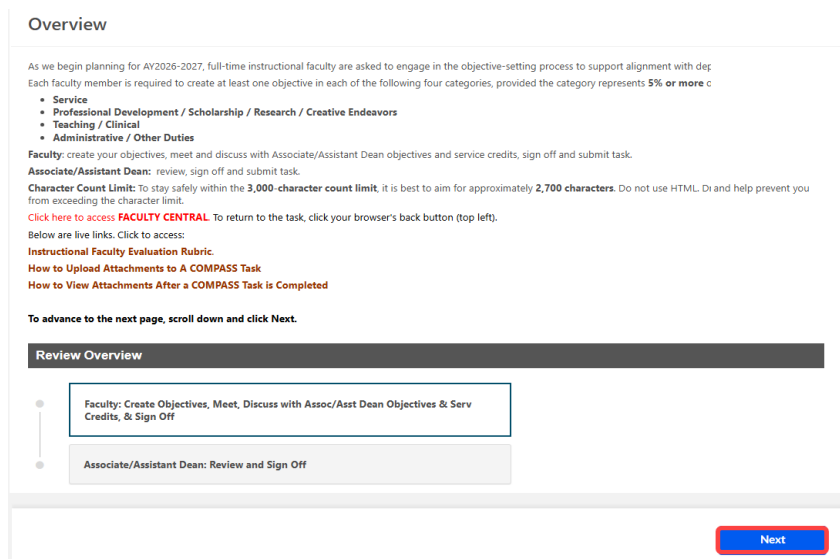
The task appears in the **Action Items** section of the faculty member's **COMPASS Welcome** page.

Click the **task link** to open the review and complete the requested updates.



The **Overview** page opens.

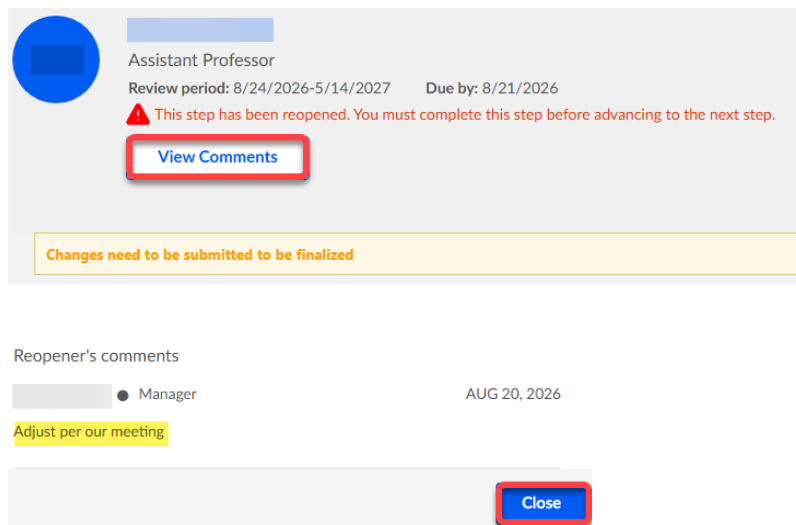
Click **Next**.

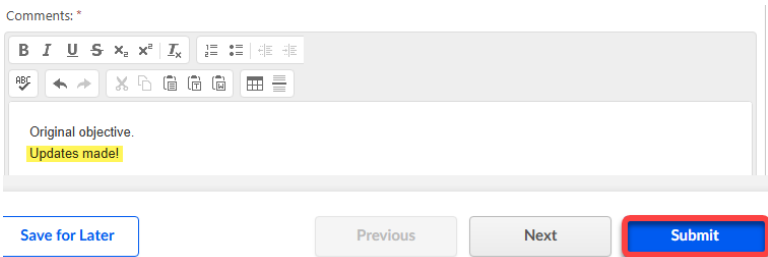


A message in **red** indicates that the step has been reopened (\***This step has been reopened.**\*).

Click **View Comments** to view comments entered by the individual who reopened the task.

Click **Close** to return to the review and complete the requested updates.



|                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                    |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Make the necessary updates in the <b>Comments</b> field(s)</p> <p>When all updates are complete, click <b>Submit</b>.</p>                                                                  |                                                                                                                                                                                                                                                                                  |
| <p>A confirmation message asks whether the review is ready to be submitted.</p> <p>Click <b>Submit review</b> to complete the submission, or click <b>Cancel</b> to return to the review.</p> | <p><b>Are you sure you want to submit your Faculty: Create Objectives, Meet, Discuss with Assoc/Asst Dean Objectives &amp; Serv Credits, &amp; Sign Off?</b></p> <p>You will not be able to modify once you have submitted.<br/>Are you sure you want to submit now?</p> <p><input type="button" value="Cancel"/> <input type="button" value="Submit review"/></p> |
| <p>A confirmation message indicates the task was submitted successfully.</p> <p>Click <b>Exit</b>.</p>                                                                                        | <p></p> <p><b>You have successfully submitted the Faculty: Create Objectives, Meet, Discuss with Assoc/Asst Dean Objectives &amp; Serv Credits, &amp; Sign Off!</b></p> <p><input type="button" value="Exit"/> <input type="button" value="Return to Review"/></p>              |

## Emails:

An email is automatically sent to the associate/assistant dean when the task is resubmitted.

If you need further assistance, email [humanresources@tri-c.edu](mailto:humanresources@tri-c.edu).