MANAGER REVIEW — MANAGERS

Description: This job aid provides instructions on how to review and provide feedback to staff for mid-year review.

Applies to: Faculty and Staff Managers

Note: Fields not specified in this document are to be skipped or left blank.

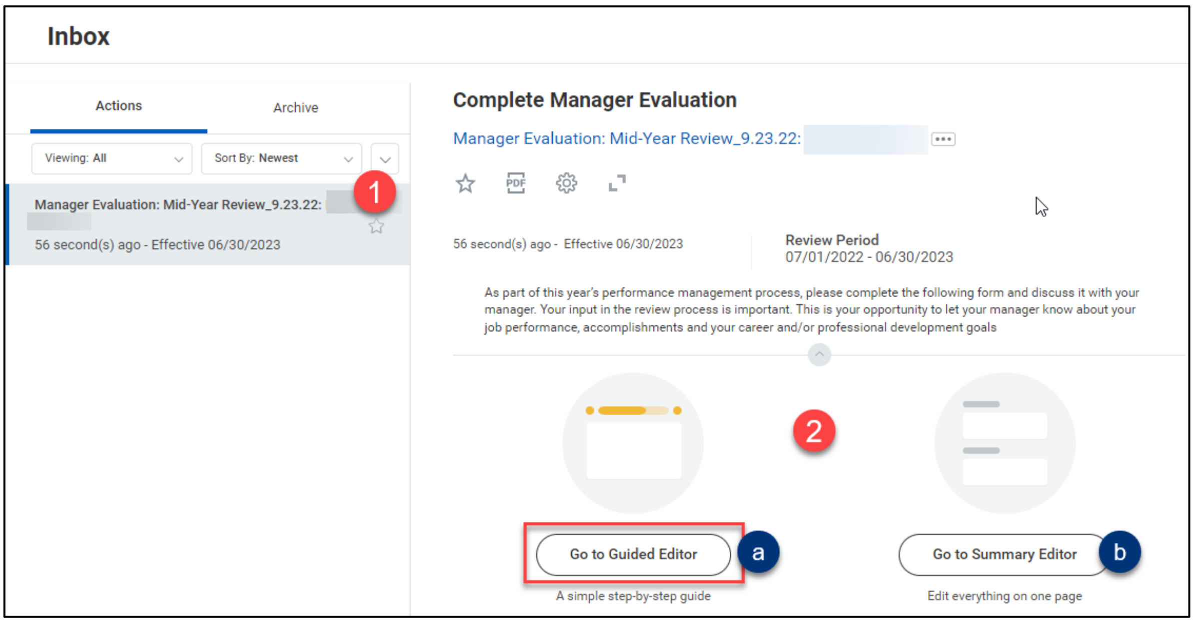
The mid-year review process begins with staff completing self-evaluation questions in Workday. When staff have completed the form, you will receive an email and an Inbox Action item.

FIND EMPLOYEE’S SELF-EVALUATION

When employees submit their completed evaluation, you will receive an email notification. Log in to Workday and go to the Inbox.

> ***Note**: Your staff will request their job descriptions from you if needed.*

1. Select **Manager Evaluation: Mid-Year Review**.



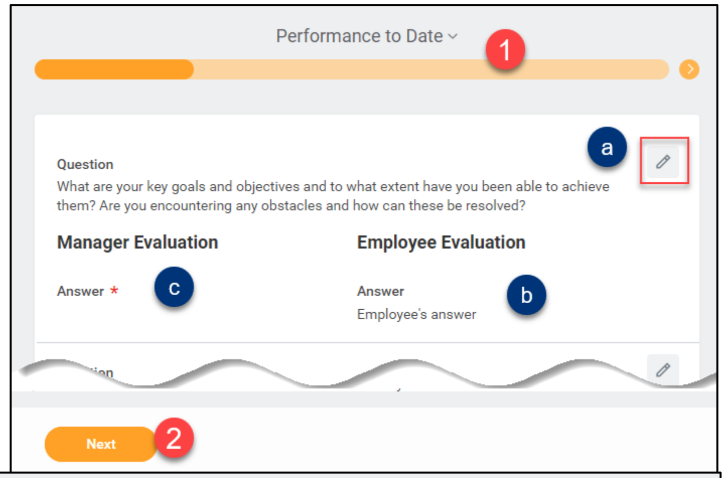
2. Click **Guided Editor**.
   a. **Guided Editor** shows additional help text and displays one section at a time.
   b. **Summary Editor** shows all sections on one page.

REVIEW AND PROVIDE FEEDBACK

The self-evaluation has three sections Performance to Date, Future and Overall. sections with a total of 7 questions.

1. **Evaluation Questions**
   a. Click the pencil icon to add your feedback.
   b. The employee's answers are shown.
   c. Enter your response in the space provided.
   d. Click the check mark when finished.

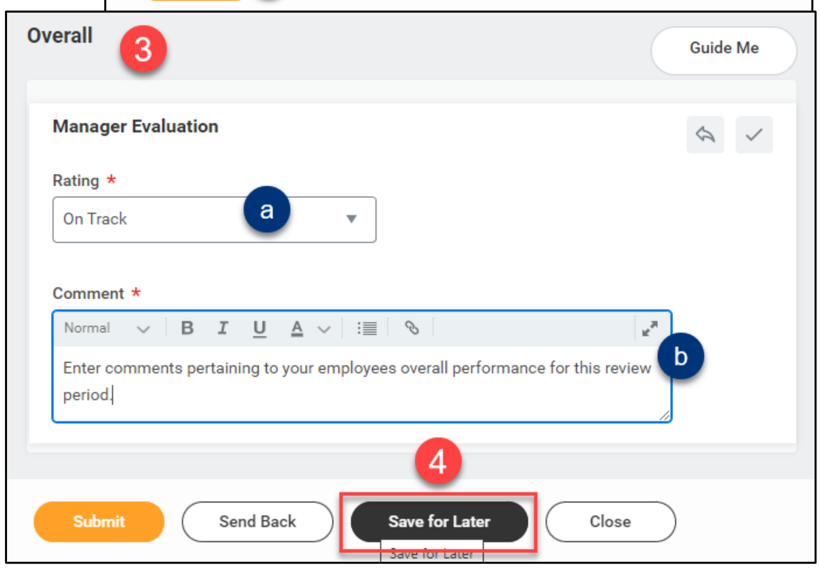
   Repeat steps a-d for each question in this section.



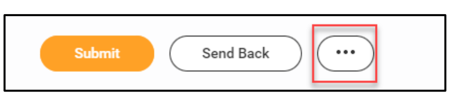
2. Click **Next** to move to the Future section and repeat steps a-d for each question.

3. **Overall**
   a. Select a **Rating,** On Track or Not On Track**,** for the employee's mid-year progress toward their objectives.
   b. Enter a comment pertaining to the employee's overall performance for this review period.

Optionally, you may **Send Back** if you need additional information (see **Send Back for Additional Information** section below)



4. When you are finished with feedback, click **Save for Later**.
   – If you do not see the Save for Later button, click the ellipsis.

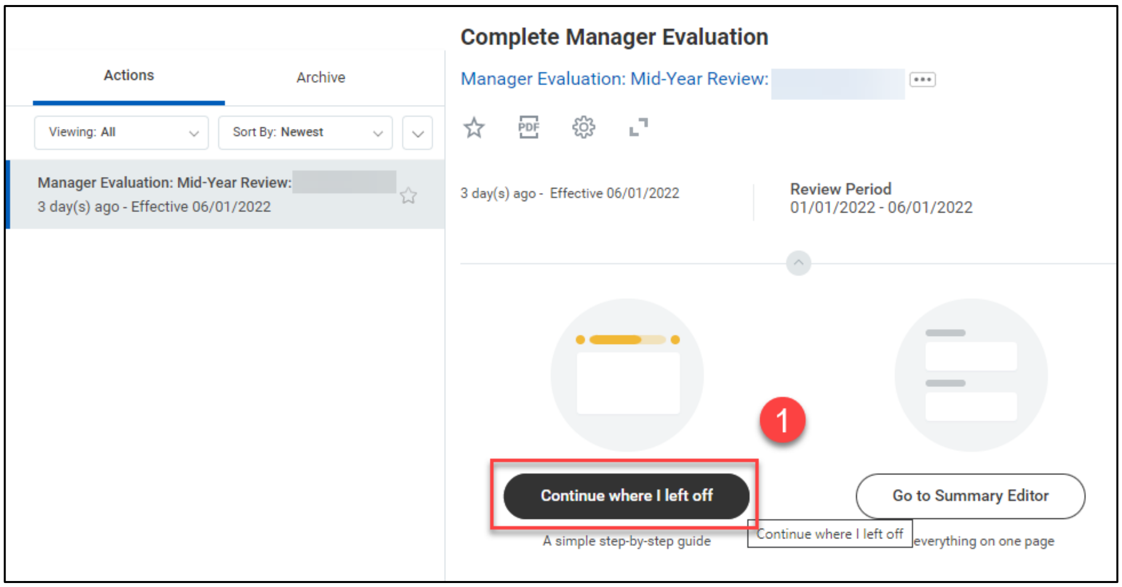


> ***Note**: Do not click **Submit** until you have met with your employee. You will not be able to edit any answers or change the rating.*

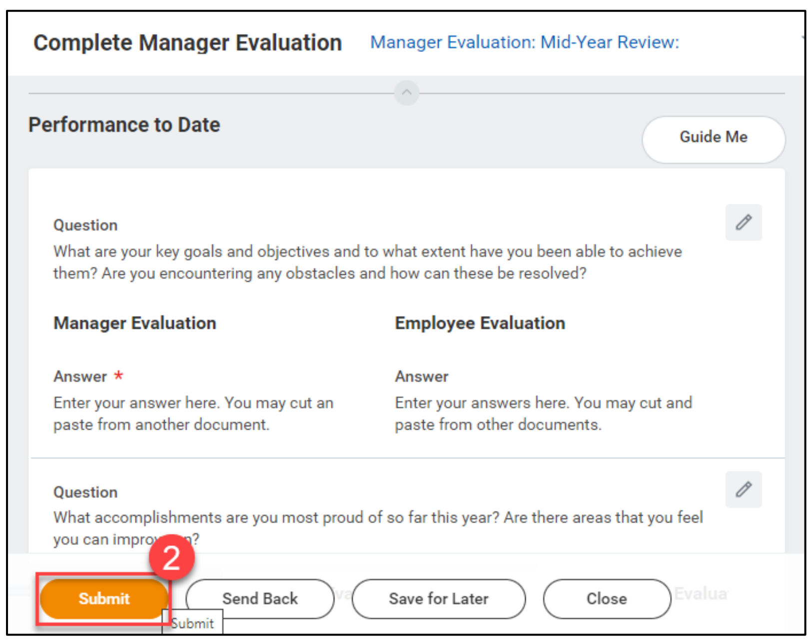
Next Steps: Schedule a meeting for you and your employee to discuss the review and rating. You may return to the evaluation and edit if necessary.

ACKLOWLEDGE AND FINALIZE THE REVIEW

1. After you meet with your employee, go to your Inbox, select the employee's review and click **Continue where I left off**



2. Make any edits, if necessary then click **Submit**.

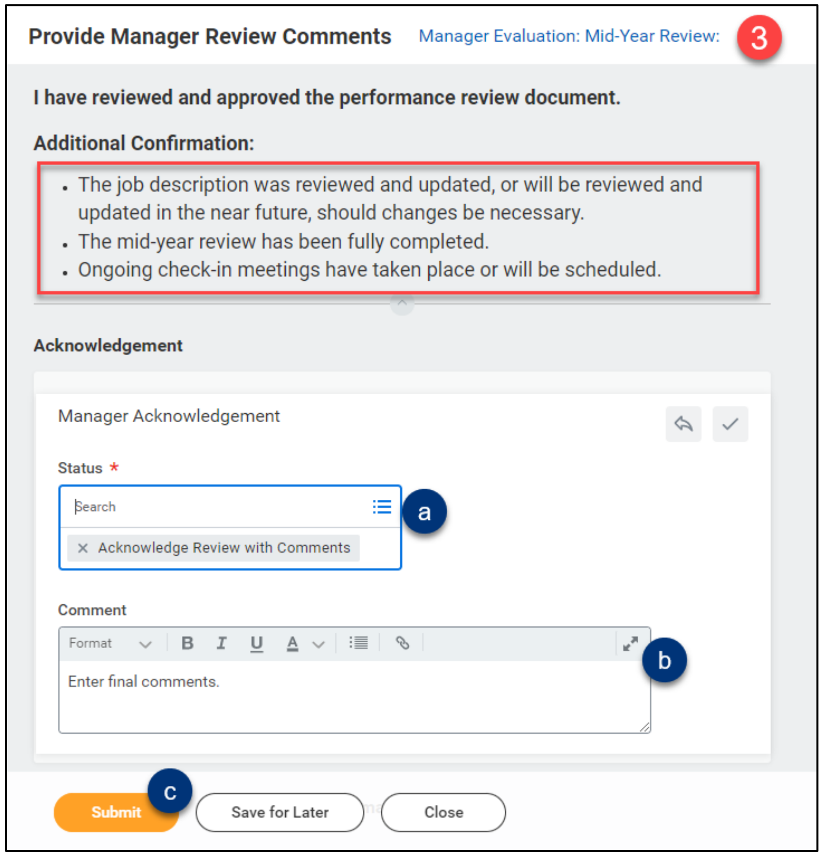


3. Review the **Additional Confirmation** statement then click the pencil icon to edit.

   a. In the **Status** field select:
      – Acknowledge Review without Comments, or
      – Acknowledge Review with Comments.

   b. Enter comments if necessary.

   c. Click **Submit** to complete the process.

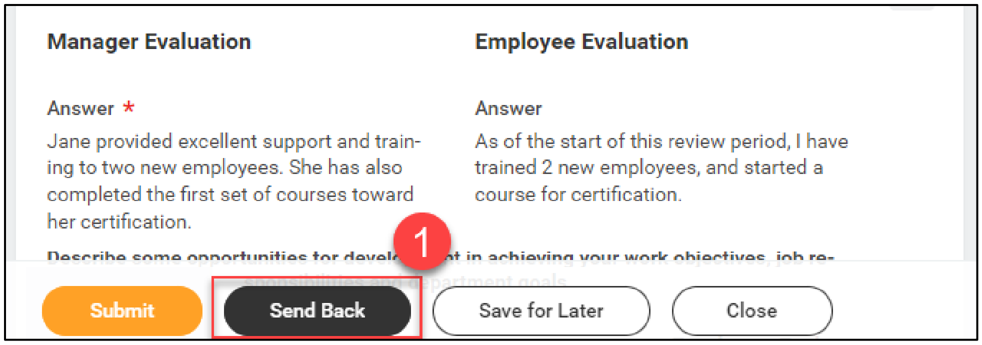


The process is complete when the employee submits their acknowlegement.

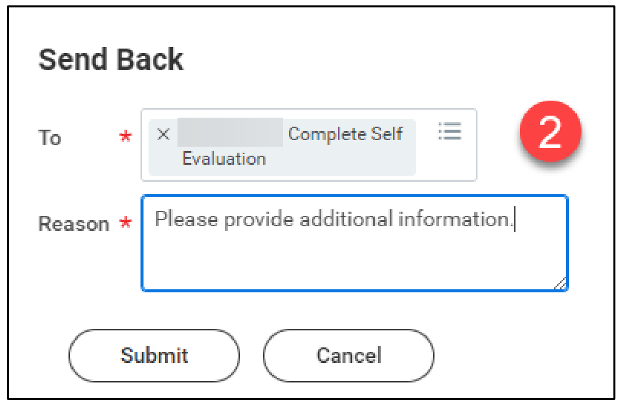
SEND BACK FOR ADDITIONAL INFORMATION

If you require additional information from the employee, you may send it back to them for editing.

1. Click **Send Back** at the bottom of the form.



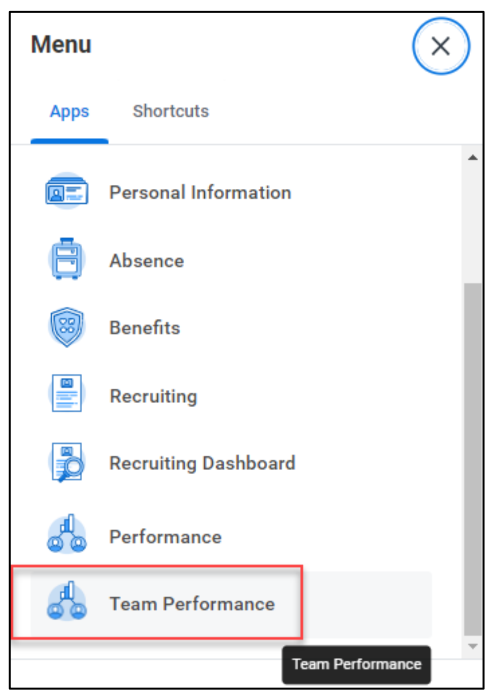
2. Describe the **Reason** you are sending this back in the box. Then click **Submit**.



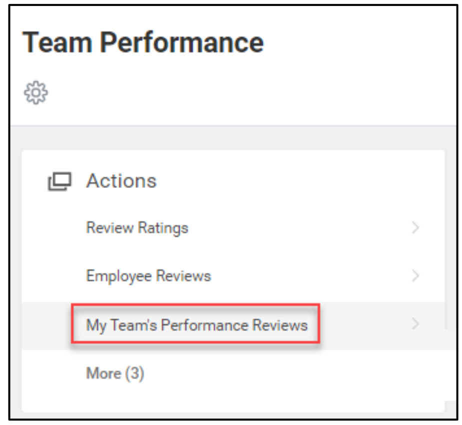
The employee will receive an inbox Action item.

VIEW PENDING AND COMPLETED REVIEWS

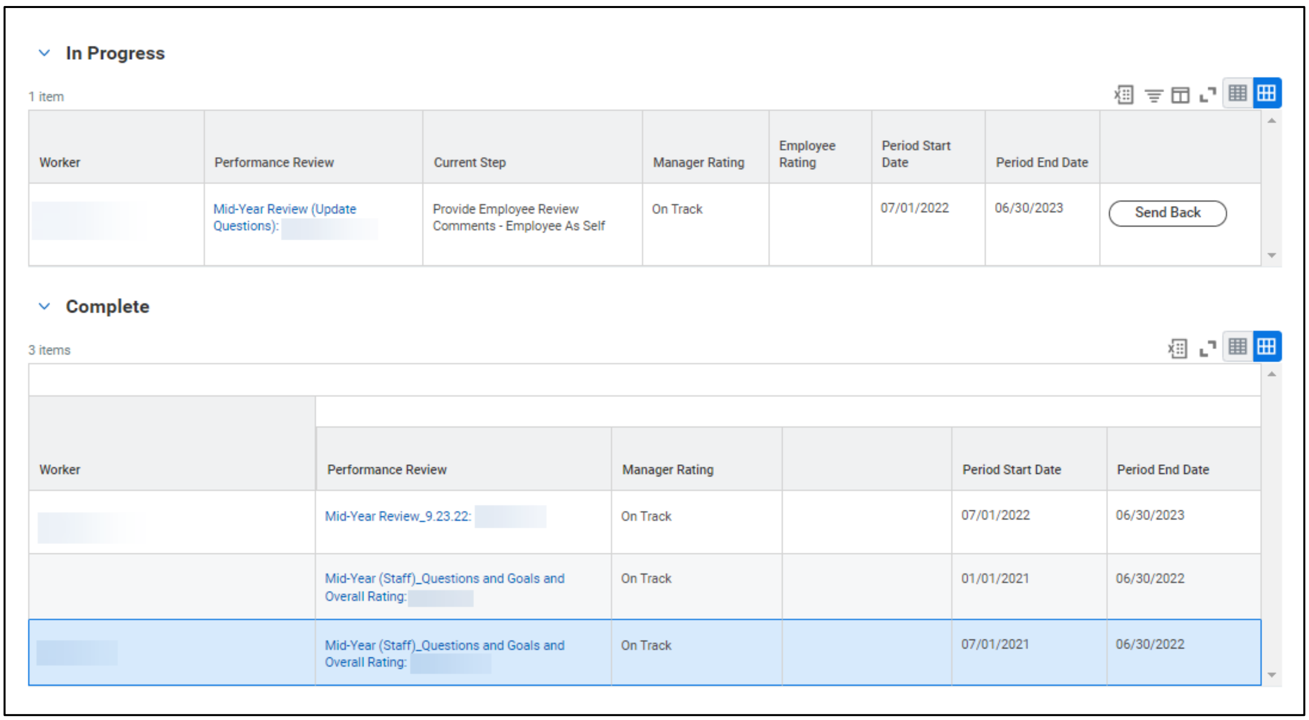
1. Open the Global Navigation menu on your Workday workscreen and select the **Team Performance** app.



2. Select **My Team's Performance Reviews**.



3. Expand the **In Progress** and **Complete** sections to see the reviews.



In Progress

1 item

Worker	Performance Review	Current Step	Manager Rating	Employee Rating	Period Start Date	Period End Date	
	Mid-Year Review (Update Questions):	Provide Employee Review Comments - Employee As Self	On Track		07/01/2022	06/30/2023	Send Back

Complete

3 items

Worker	Performance Review	Manager Rating		Period Start Date	Period End Date
	Mid-Year Review_9.23.22:	On Track		07/01/2022	06/30/2023
	Mid-Year (Staff)_Questions and Goals and Overall Rating:	On Track		01/01/2021	06/30/2022
	Mid-Year (Staff)_Questions and Goals and Overall Rating:	On Track		07/01/2021	06/30/2022

If a section is blank, that indicates that there are no reviews either In Progress or Completed.