

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

The annual 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: Annual Performance Review.

Inbox

Actions

Archive

Viewing: All

Sort By: Newest

Manager Evaluation: Annual Staff Performance Review (IC) [redacted] 1 minute(s) ago - Effective 06/30/2023

Self Evaluation: Annual Staff Performance Review (Mgr) [redacted] 3 hour(s) ago - Effective 06/30/2023

Complete Manager Evaluation Manager Evaluation: Annual Staff Performance Review (IC): [redacted]

Review Period 07/01/2022 - 06/30/2023 1 minute(s) ago - Effective 06/30/2023

As part of this year's performance management process, please complete the following form and discuss it with your manager. *Your input in the review process is important. This is your opportunity to let your manager know about your job performance, accomplishments and your career and/or professional development goals.*

Timeline for 2023 Year-End Annual Performance Reviews

- On March 16, 2023 Year-End/Annual Review training began for managers and staff.
- On March 22, 2023, the Year-End/Annual Review process will open and all Eligible Staff will be able to complete self-evaluations.
- On May 19, 2023, the Year-End/Annual Review process will end. This means that all self-evaluations and manager evaluations must be completed and submitted in Workday by May 19th.

Training:
Manager and Staff Annual Review Training is available now through April. Computer-based Training and Recorded training sessions will be available on the [TAP Website](#).

Get Started

2. Click Get Started.

REVIEW AND PROVIDE FEEDBACK

The self-evaluation has five sections: Performance, Core Competencies, Development Opportunities, Goal Setting, and Overall with a total of 7 questions.

1. Evaluation Questions

For each question, the employee's answers are shown to the right of the Manager's response:

Complete Manager Evaluation
 Manager Evaluation: Annual Staff Performance Review (IC)
 07/01/2022 - 06/30/2023

Performance

The annual review is designed to formally assess staff performance over the entire review period. Using the ratings in the drop-down box, please select the rating that best aligns with your overall performance achieved. **The rating identified will account for 50% of the overall rating for the current review period.**

Rating Scale

Exceeds Expectations: The employee consistently exceeds expectations and demonstrates exceptional performance and innovation in what is produced, how it is produced, and mastery of the competencies. They are competent, innovative, collaborative, productive and go above and beyond the scope of the job. They embrace change and seek continuous improvement opportunities, recommending solutions. The employee is often sought out by others for counsel and assistance and is widely recognized as a role model who willingly shares knowledge and takes initiative to go above and beyond expectations. They lead change efforts, identify new opportunities and champion continuous improvement with significant positive impact. They require minimal direction. **This rating should be used sparingly and reserved for exceptional contributors throughout the review period.**

Successful: The employee consistently achieves expectations. They demonstrate capable, effective, and satisfactory performance on both what it is produced, how it is produced, and mastery of many competencies. Their ongoing performance meets and occasionally exceeds performance standards for the position throughout the review period. The individual is dependable, collaborative and productive. They are generally receptive to change and seek continuous improvement opportunities. They consistently take initiative and require moderate to minimal direction.

Developing: The employee achieves expectations in some areas and falls below in others. Actions and outcomes demonstrate inconsistent capability and/or effort or require significant guidance and support. This category typically includes new employees, newly promoted or transfer employees, who may be evaluated against "learning the job" versus expectations for longer tenured fully proficient team members. This rating may reflect developing skills and experience, and indicate that more training, coaching and/or support is needed to enable success.

Improvement Needed: The employee consistently performs below expectations or standards for the position. What is produced, how it is produced, and mastery of competencies are not acceptable. The employee inconsistently takes initiative to complete work and requires significant to moderate direction. The employee's ongoing performance must improve within a defined time frame to remain in the position. **A Performance Improvement Plan should be initiated, collaborating with HR/Employee Relations if an employee's overall rating is improvement needed.**

Question In this section, please evaluate and summarize your overall job performance against current year goals/objectives. Please include in the answer box your key goals and objectives met (goals listed from last year's annual performance evaluation or listed in your mid-year review) and/or essential functions from your job description.

Manager	Employee
Rating * select one	Rating Successful
Rating Description (empty)	Rating Description Behavioral definition: The employee consistently achieves expectations. They demonstrate capable, effective, and satisfactory performance on both what it is produced, how it is produced, and mastery of many competencies. Their ongoing performance meets and occasionally exceeds performance standards for the position throughout the review period. The individual is dependable, collaborative and
Answer Format B I U A	

Back Next Save for Later Close

- a. Click the rating drop down menu and select which rating best applies to your employee.

Manager

Rating

Rating Description

Answer

* select one

select one

Exceeds Expectations

Successful

Developing

Improvement Needed

b.

Manager

Rating ★ Successful ▼

Rating Description Behavioral definition: The employee consistently achieves expectations. They demonstrate capable, effective, and satisfactory performance on both what it is produced, how it is produced, and mastery of many competencies. Their ongoing performance meets and occasionally exceeds performance standards for the position throughout the review period. The individual is dependable, collaborative and productive. They are generally receptive to change and seek continuous improvement opportunities. They consistently take initiative and require moderate to minimal direction.

Answer

Normal ▼ **B** *I* U A ▼ |

Enter comments pertaining to your employees overall performance for this review period. |

2. Click **Next** to move to the next section and repeat the steps above for each question.
3. When you are finished with feedback, click **Save for Later**.

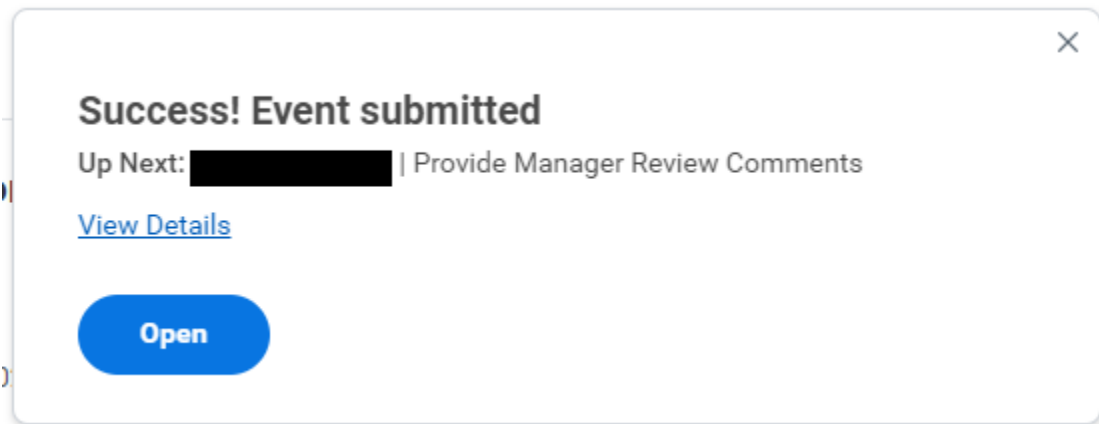
Submit **Send Back** **Save for Later**

Event saved. Awaiting submission
Up Next: | Complete Manager Evaluation
[View Details](#)
Open

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.

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

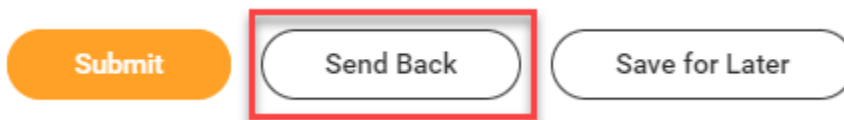
5. After reviewing the evaluation together, click **Submit**.



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**.

A form titled "Send Back". It has a "To" field with a red asterisk, containing a dropdown menu with a red X icon, a redacted name, and the text "- Complete Self Evaluation". Below it is a "Reason" field with a red asterisk and a large text area. At the bottom are "Submit" and "Cancel" buttons.

3. The employee will receive an inbox Action item.

ACKNOWLEDGE AND PROVIDE MANAGER REVIEW COMMENTS

1. After you meet with your employee, go to your Inbox, select the employee's review and click **Get Started**

Inbox

Actions

Archive

Viewing: All

Sort By: Newest

Manager Evaluation: Annual Staff Performance Review (IC): [REDACTED]

1 hour(s) ago - Effective 06/30/2023

Self Evaluation: Annual Staff Performance Review (Mgr): [REDACTED]

5 hour(s) ago - Effective 06/30/2023

Provide Manager Review Comments

Manager Evaluation: Annual Staff Performance Review (IC): [REDACTED]

Evaluated By: [REDACTED]

1 hour(s) ago - Effective 06/30/2023

Review Period

07/01/2022 - 06/30/2023

I have reviewed and approved the contents and evaluations of this performance review.

Additional Confirmation:

- The job description was reviewed and updated, or will be reviewed and updated in the near future, should changes be necessary.
- The year-end review has been fully completed.
- Ongoing check-in meetings have taken place or will be scheduled.
- If the overall rating is Improvement Needed please reach out to your HR Business Partner.

Get Started

2. Review Summary, and then click **Next**.

Provide Manager Review Comments

Manager Evaluation: Annual Performance Review (IC) - [REDACTED]

WIP

Actions

07/01/2022 - 06/30/2023

Evaluated By: [REDACTED]

Summary

Acknowledgement

Summary

Performance

Question

In this section, please evaluate and summarize your overall job performance against current year goals/objectives. Please include any particular accomplishments, objectives met and/or demonstrated strengths during this period in the comment box.

Manager

Rating

Exceeds Expectations

Rating Description

Behavioral definition: The employee consistently exceeds expectations and demonstrates exceptional performance and innovation in what is produced, how it is produced, and mastery of the competencies. They are competent, innovative, collaborative, productive and go above and beyond the scope of the job. They embrace change and seek continuous improvement opportunities, recommending solutions. The employee is often sought out by others for counsel and assistance and is widely recognized as a role model who willingly shares knowledge and takes initiative to go above and beyond expectations. They lead change efforts, identify new opportunities and champion continuous improvement with significant positive impact. They require minimal direction. This rating should be used sparingly and reserved for exceptional contributors throughout the review period.

Answer

Enter comments pertaining to your employees overall performance for this review period.

Employee

Rating

Successful

Rating Description

Behavioral definition: The employee consistently achieves expectations. They demonstrate capable, effective, and satisfactory performance on both what it is produced, how it is produced, and mastery of many competencies. Their ongoing performance meets and occasionally exceeds performance standards for the position throughout the review period. The individual is dependable, collaborative and productive. They are generally receptive to change and seek continuous improvement opportunities. They consistently take initiative and require moderate to minimal direction.

Answer

Provide complete, detailed answers.

Manager Summary

Rating Description

Behavioral definition: The employee consistently exceeds expectations and demonstrates exceptional performance and innovation in what is produced, how it is produced, and mastery of the competencies. They are competent, innovative, collaborative, productive and go above and beyond the scope of the job. They embrace change and seek continuous improvement opportunities, recommending solutions. The employee is often sought out by others for counsel and assistance and is widely recognized as a role model who willingly shares knowledge and takes initiative to go above and beyond expectations. They lead change efforts, identify new opportunities and champion continuous improvement with significant positive impact. They require minimal direction. This rating should be used sparingly and reserved for exceptional contributors throughout the review period.

Employee Summary

Rating Description

Behavioral definition: The employee consistently achieves expectations. They demonstrate capable, effective, and satisfactory performance on both what it is produced, how it is produced, and mastery of many competencies. Their ongoing performance meets and occasionally exceeds performance standards for the position throughout the review period. The individual is dependable, collaborative and productive. They are generally receptive to change and seek continuous improvement opportunities. They consistently take initiative and require moderate to minimal direction.

Back

Next

Close

3. In the **Status** field select:

- Acknowledge Review without Comments, or
- Acknowledge Review with Comments.

Acknowledgement

Manager

Status *

Comment ☐ Acknowledge Review without Comments ☐ Acknowledge Review with Comments

- a. Enter comments if necessary.

Acknowledgement

Manager

Status *

Comment

Normal **B** *I* U

Enter final comments.

- b. Click **Submit** to complete the process.

Success! Event submitted

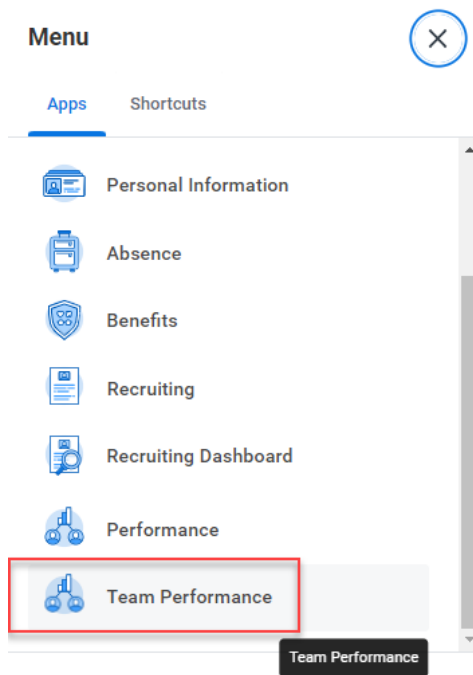
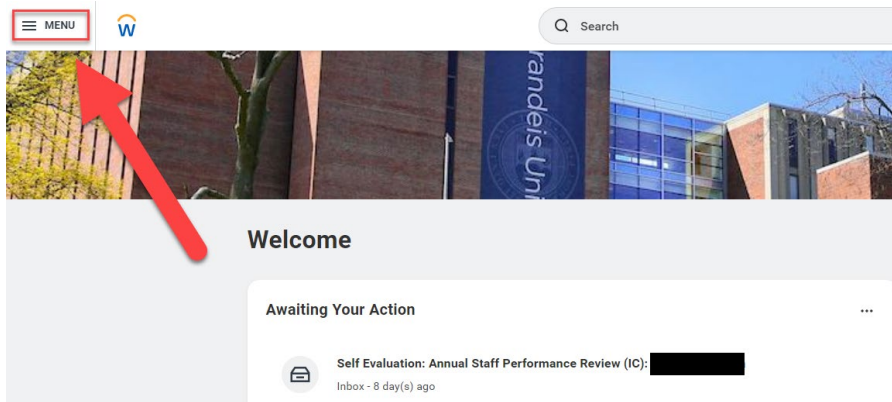
Up Next: Provide Employee Review Comments

[View Details](#)

- c. The process is complete when the employee submits their acknowledgement.

VIEW PENDING AND COMPLETED REVIEWS

1. Open the **Menu** located on the top left of your Workday workscreen and select the **Team Performance** app.



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

Team Performance

Actions

Review Ratings >

Employee Reviews >

My Team's Performance Reviews >

More (3)

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	
	Annual Performance Review (IC) - WIP:	Provide Employee Review Comments - Employee As Self	Exceeds Expectations	Exceeds Expectations	07/01/2022	06/30/2023	<div>Send Back</div>

▼ Complete

1 item

Worker	Performance Review	Manager Rating	Employee Rating	Period Start Date	Period End Date
	Mid-Year Review	On Track		07/01/2022	06/30/2023

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