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**.

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:

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

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.
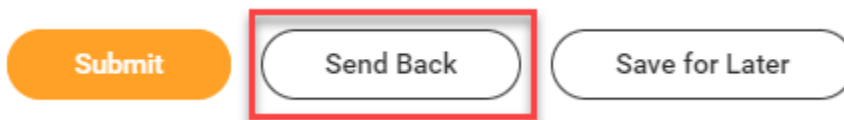
5. After reviewing the evaluation together, click **Submit**.
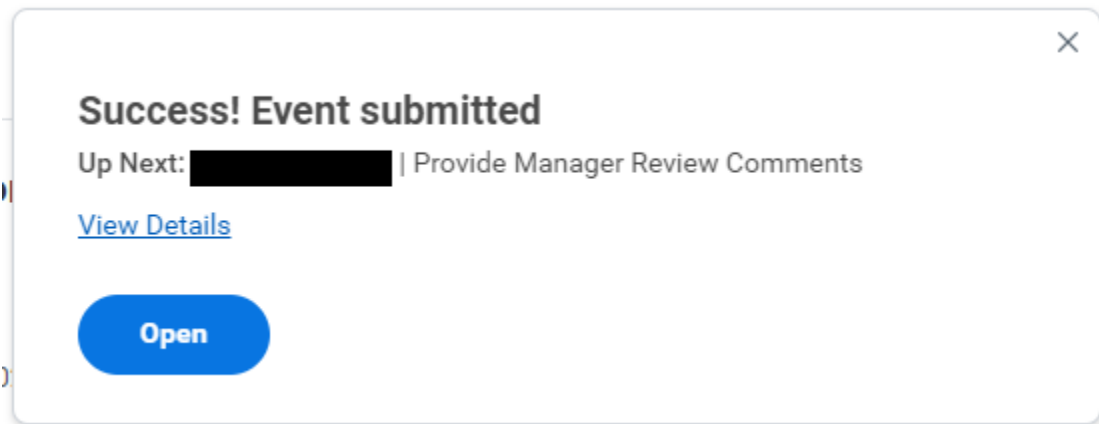
SEND BACK FOR ADDITIONAL INFORMATION

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**.

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**

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

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

– Acknowledge Review without Comments, or

– Acknowledge Review with Comments.

Acknowledgement

Manager

Status   ***** Search   ☰

          ○ Acknowledge Review without Comments

Comment

          ○ Acknowledge Review with Comments

a. Enter comments if necessary.

Acknowledgement

Manager

Status   *****   × Acknowledge Review with Comments   ☰

Comment   Normal ∨   **B** *I* <u>U</u> A ∨   ☰   ⌗

         Enter final comments.

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

                                                         ☒
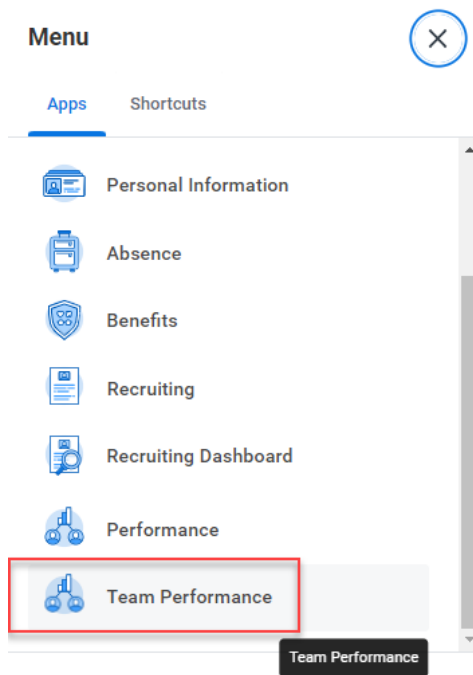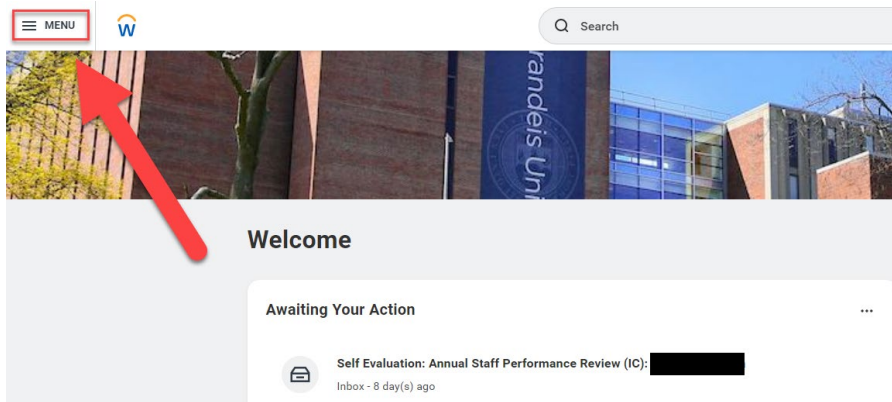
Success! Event submitted

Up Next: ▮▮▮▮▮▮▮▮▮▮ | Provide Employee Review Comments

<u>View Details</u>

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	Send Back

⌄ 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.