

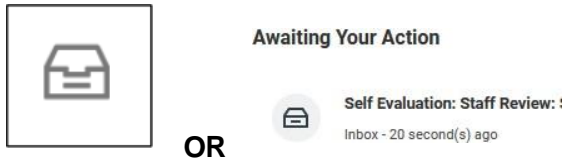
Overview

Use this job aid as a resource to complete an employee’s self-evaluation of the annual performance review. A staff performance review promotes communication between supervisor and team member with job expectations and how such expectations should integrate with unit goals; identify performance objectives so as to increase effectiveness and efficiency of an individual’s job performance and to accomplish unit goals; provide useful feedback about job performance; facilitate better work relationships; contribute to professional development; and provide a historical record of job performance.

The Talent Administrator initiates the annual performance review for employees – administrator, department chairs, supervisors, and staff. An employee will receive a Workday Inbox task to complete Self Evaluation. Once an employee completes the self-evaluation of the Performance Review form and submits it, it routes to the employee’s supervisor/manager for completion.

Performance Review Evaluation

1. From the **Home** Screen, you will find your Self Evaluation Inbox item either by clicking the **Inbox** icon in the upper right-hand corner or from under **Awaiting Your Action**.



2. Select the **Complete Self Evaluation**: Your Name
OR, from your Workday homepage, under Awaiting Your Action, select the Self Evaluation, Staff Review.
3. Click on Get Started

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

Get Started

4. Read the **Introduction** at the top of the page.
5. Complete each section of the evaluation. Each section of the evaluation corresponds to the section titles below. Please review the instructions for each section as needed.

Primary Work Responsibilities

In the **Employee** section, enter comments in the text field and provide **1)** an assessment of performance in the primary work responsibilities during this review period, highlighting strengths and areas for opportunity and **2)** whether the applicable training was completed in this fiscal year. The key responsibilities and supporting duties can be found in the position description. Use the position description as a reference to ensure a comprehensive evaluation of strengths and opportunities for improvement. Please note that a **red asterisk (*)** denotes a required field to complete.

In the **Summary** section, an employee selects their evaluation rating. Please note that this section has an overall rating weight of 33.33%.

Complete Employee Self-Evaluation - Annual Performance Review

Workday Job Aid for Employee

Descriptions of each rating can be found on the Performance Management page [here](#). Click the Next button to move to the next section. A pop-up window will state that changes were saved.

Goals

On this page, you have the opportunity to reflect on your goals during the review period. While the use of the Goals function within Workday is recommended, it is optional. Any goals that were approved within the timeframe of this review will automatically appear on this page.

Please note that if there are no goals listed, it will NOT negatively impact your evaluation.

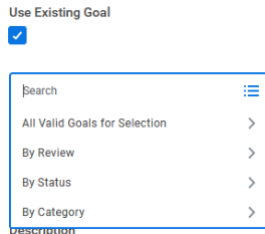
In the **Employee Summary** section, Workday calculates the rating for the Goals section. This section is weighted 33.34%. Click Next to advance to the next section.

If goals are not in the annual review, you can add goals into the annual review by bringing in existing goals or adding new goal(s).

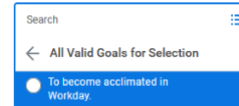
To add goal(s), click on Add. To pull in an existing goal, click on the button under Use Existing Goal.

Use Existing Goal

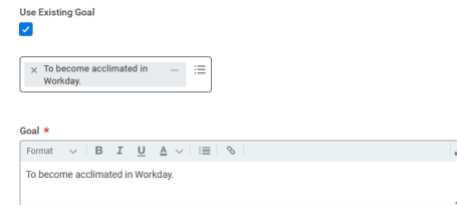
1. Click on the menu bar on the right.



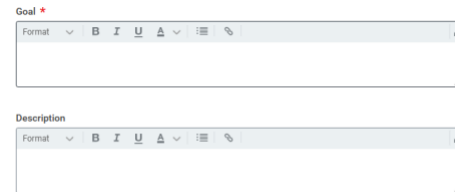
2. Click the right arrow by All Valid Goals for Selection.



3. Select the radial button of goal you want to bring into review.
4. Goal information will populate into review.



5. Continue this step if bringing in additional existing goal(s) OR to add a new goal.
6. Enter the Goal and provide comments about this goal. Required fields are noted by the red asterisk (*). Enter text in the other text boxes as needed.



7. Once goals are completed, to move to the next section, click Next at the bottom of the.

Competencies

For each competency, choose an appropriate rating from the dropdown menu provided. While adding comments is optional, it can help provide context. This section is weighted 33.33%

Use the double arrows at the right to expand the competency box.



Click on the double arrow to return it to its original format.



Descriptions of each rating can be found on the Performance Management page [here](#).

Under the Employee **Summary** section, the Proficiency Rating is automatically calculated based on the self-evaluation ratings selected of the Collegewide competencies. Click Next at the bottom of the page to advance to the next section. A pop-up window states your changes were saved.

Competencies Specific Feedback

A **red asterisk (*)** denotes the two text boxes as required fields.

- 1) Provide feedback on competency-related strengths.
- 2) Provide feedback on competency-related opportunities for growth and improvement.

Click Next at the bottom of the page to move to the next section.

Professional Development Goals

In this section, enter your Professional Development Goals.

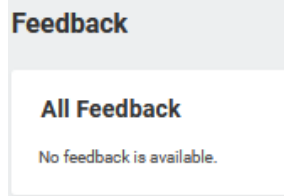
1. Enter a Professional Development Goal(s) if not already entered. OR Place a check mark (√) under Use Existing Professional Development Goal. This allows you to pull in a previously created Professional Development Goal.
2. Review each Professional Development Goal.
3. The following are optional to complete:
 - a. Additional Information – enter information/description/background information about a professional development goal
 - b. Category – you can select more than one category that best fits the professional development goal
 - c. Start Date – enter the start date of the professional development goal
 - d. Due Date – enter a completion date of the professional development goal
 - e. Status note – enter information about the status of the professional development goal
4. Status – you must select the status of the professional development goal from the four options.
5. Click Add to enter another professional development goal and follow steps 2-3.
6. The Summary section is optional and provides an opportunity to enter additional comments about professional development goals not written elsewhere.
7. Professional Development Goals capture goal status.
8. This section is not rated nor weighted.
9. To advance to the next Section, click Next at the bottom of the page.

Feedback

Feedback given to you during the review period are included in the performance evaluation. See screenshot below. The number of feedback is visible. Click on the number. A separate window opens with the feedback with the date and from whom. If no feedback were given during the review period, no number will appear and state “No feedback is available”.

All Feedback

Requested Feedback 2

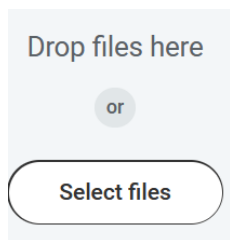


To advance to the next Section, click Next at the bottom of the page.

Supporting Documents

In this section, you can upload documents to share with your supervisor/manager. There is no limit to the size or number of documents.

1. Drop files here or Click Select Files



- a. Find your document.

- b. Select the document.
- c. Click Open.
- d. Document is attached.
- e. Repeat steps to upload additional documents.
- f. If an error was made uploading a document, click on the trash at the top right. This will remove the document.



- g. Click Next at the bottom of the page to move to the next section.

Overall

The overall comment is optional and serves as an opportunity for you to address any additional information, accomplishments, or insights that were not covered in the previous sections of the evaluation.

Click Next at the bottom of the page to move to the next section.

Review and Submit Self-Evaluation

This section provides an opportunity to review the self-evaluation and allows for edits, changes, and corrections. Use the right scroll bar to navigate up and down this page.



Use the left navigation pane to select the section you wish to make edits. To save the edits, click on Next, Save for Later, or Close. Once your edits are made, at this stage of the self-evaluation, you can:

- a. **Submit** – this will send the self-evaluation to the supervisor/manager for their completion
- b. **Save for Later** – this allows for the annual review to

Complete Employee Self-Evaluation - Annual Performance Review

Workday Job Aid for Employee

- c. remain in your **Inbox** as a task until you are ready to Submit
- d. **Close** – a window appears stating: Changes Save. You're leaving this task. Your changes are saved.

The screenshot below appears after you hit Submit.

Success! Event submitted.

Up Next: Name of your Supervisor, Staff Review,
Complete Manager Evaluation
[View Details](#)

[View Next Page for Acknowledgement](#)

Acknowledgement

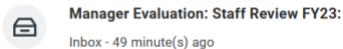
After meeting with your manager/supervisor, return to your Workday inbox to acknowledge your annual performance review.

1. From the **Home** Screen, you will find your **Manager Evaluation: Staff Review FY23** inbox item either by clicking the **Inbox** icon in the upper right-hand corner or from under **Awaiting Your Action**.



OR

Awaiting Your Action



2. Select the **Manager Evaluation: Staff Review FY23**: Your Name, from your Workday homepage, under Awaiting Your Action, select the **Manager Evaluation: Staff Review FY23**.
3. Read the statement at the top of the page: *I have reviewed the performance evaluation on the date indicated below. I had the opportunity to discuss with my supervisor and have received a copy of the evaluation. My signature does not necessarily indicate agreement or disagreement with the content of this evaluation.*
4. Click on Get Started
5. Summary Section of the evaluation is visible.
6. Use the scroll bar to the right to navigate up and down the

evaluation.

7. You can view the full evaluation with your self-evaluation and manager comments and ratings.
8. Click Next.
9. On the Acknowledgement page:
 - a. Status is required denoted by the **red (*)**.
 - b. Select an option from the drop-down menu
 - i. Acknowledge Review without Comments **OR**
 - ii. Acknowledge Review with Comments
 - c. If you select Without Comments, skip the Comment text field box.
 - d. If you select With Comments, enter your comments in the Comment text box.
10. Click Save for Later to come back later. OR
11. Click Submit.
12. A pop-up window states You have submitted. Up Next: the name of your manager.
13. Acknowledgement by you and your manager moves the FY23 Performance Review to completed.