Complete Employee Self-Evaluation - Annual Performance Review
Workday Job Aid for Employee

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 My Tasks 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 My Tasks item either by clicking the **My Tasks** icon in the upper right-hand corner or from under **Awaiting Your Action**.
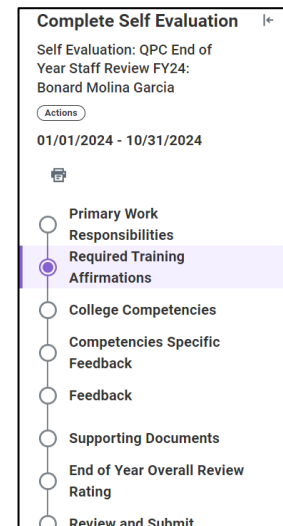
   Awaiting Your Action

   Self Evaluation: Staff Review
   My Tasks - 1 minute(s) ago

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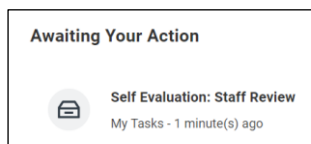
2. Select the Complete **Self Evaluation**: Your Name
   OR, from your Workday homepage, under Awaiting Your Action, select the Self Evaluation, Staff Review.

3. Click on Get Started

   Get Started
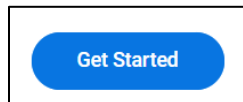
4. Read the **Introduction** at the top of the page.
5. You can navigate between sections using left menu.

Complete Self Evaluation

Self Evaluation: QPC End of Year Staff Review FY24: Bonard Molina Garcia

Actions

01/01/2024 - 10/31/2024

- Primary Work Responsibilities
- Required Training Affirmations
- College Competencies
- Competencies Specific Feedback
- Feedback
- Supporting Documents
- End of Year Overall Review Rating
- Review and Submit

6. 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)** Any performance challenges or concerns.

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 **Employee Summary** section, an employee selects their evaluation rating.

Please note that this section has an overall rating weight of 33.34%. Descriptions of each rating can be found on the Performance Management page **here**. Click the **Next** button to move to the next section. A po-up window will state that changes were saved.

Required Training Affirmation

Here, you affirm that either you have completed all the required training for your position for the fiscal year covered by this review.

For the annual review attestation, please answer Yes or No to confirm whether you have completed all required training for the year. It is essential to accurately reflect your compliance with Montgomery College's training requirements.

A Yes indicates you have fulfilled all mandatory training at the collegewide, division and department level. (No comments required.) If you select No, please provide a brief explanation, or note any training that is currently pending.

1. Click box next to rating and choose Yes or No.

2. Click **Next** to Proceed to next step.

Individual (Performance) Goal

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 33.32%. 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.

1. Click on **Add**.

2. In order to add existing goal click on **Add Existing**.

3. Goal and Description will auto populate.

4. Or you can add a new goal

5. Select the radial button of goal you want to bring into review.

6. Goal information will populate into review.

7. Enter the Goal and provide Description about this goal. Required fields are noted by the red asterisk (*). Enter text in the other text boxes as needed.

8. In **Employee** section enter rating.

9. Add any **comment.**

10. Click **Add** and continue these steps if bringing in additional existing goal(s) OR to add a new goal.

11. Click **Remove** if you want to remove a goal.

12. 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. This section is weighted 33.34%

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

 Click on the double arrow to return it to its original

formant.

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.

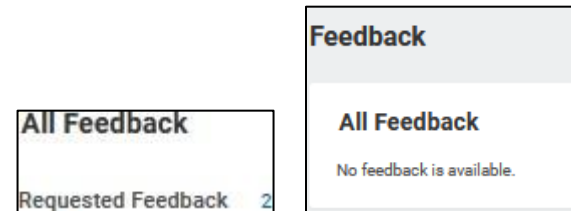3. Click **Next** at the bottom of the page to move to the next section.

Professional Development Goals (Not Rated)

In this section, enter your Professional Development Goals.

1. Enter a Professional Development Goal(s) if not already entered by click **Add** button.

2. Remove a goal by clicking on **Remove** button.
3. Review each Professional Development Goal.
4. The following are optional to complete:
   a. **Additional Information** – enter information/ description/ background information about a professional development goal
   b. **Status note** – enter information about the status of the professional development goal
   c. **Start Date** – enter the start date of the professional development goal
   d. **Completion Date** – enter a completion date of the professional development goal
   e. **Category** – you can select more than one category that best fits the professional development goal
   f. **Skills to Develop**- you can select more than one category that best fits the professional development goal
   g. **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. Professional Development Goals capture goal status.
7. This section is not rated nor weighted.
8. To advance to the next Section, click **Next** at the bottom of the page.

Feedback Provided in Workday

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.
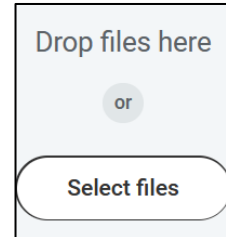

To advance to the next Section, click **Next** at the bottom of the page.

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**.

2. Find your document.
3. Select the document.
4. Click **Open**.
5. Document is attached.
6. Repeat steps to upload additional documents.

7. If an error was made uploading a document, click on the trash at the top right. This will remove the document.

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

Overall Review Rating

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

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

    c. remain in your **My Tasks** as a task until you are ready to Submit.

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

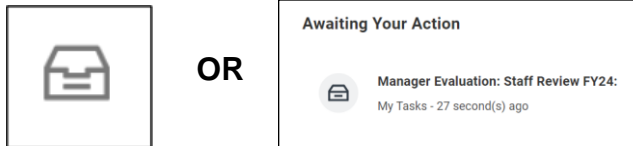## Acknowledgement

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

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

 OR

2. Select the **Manager Evaluation: Staff Review FYXX:** Your Name, from your Workday homepage, under Awaiting Your Action, select the **Manager Evaluation: Staff Review FYXX**.

3. Read the statement at the top of the page: *By acknowledging this review, you confirm that you have reviewed your supervisor's feedback and discussed your annual review with your supervisor.* ***Please note,*** *this acknowledgment* ***does not*** *signify agreement or disagreement with the review's content. An optional space for comments is provided should you wish to share any additional thoughts.*

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
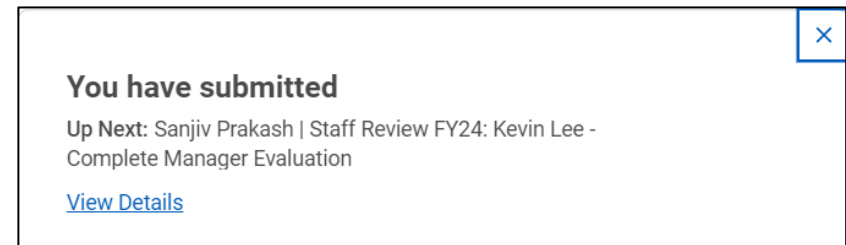
13. Acknowledgement by you and your manager moves the FYXX Performance Review to completed.