

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**.



OR

Awaiting Your Action



Self Evaluation: Staff Review: :
Inbox - 20 second(s) ago

2. Select the **Complete Self Evaluation**: Your Name
OR, from your Workday homepage, under Awaiting Your Action, select the Self Evaluation, Staff Review.
3. Read the **Introduction** at the top of the page.
4. Select one of the following options:
 - **Go to Guided Editor**: This is the preferred method to

ensure each section is completed. Select this option to see each section of the evaluation one at a time. A simple step-by-step guide. If you select this option, you will need to scroll down to navigate through each section.

- **Go to Summary Editor**: Use this section to review or edit what you entered using the Guided Editor. Select this option to see each section of the evaluation all on one page at the same time. If you select this option, you will need to scroll down to navigate through each section.
Note: Error messages will only appear when you hit Submit at the end of the Summary Editor.

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 Evaluation** section, an employee enters comments

Complete Employee Self-Evaluation - Annual Performance Review

Workday Job Aid for Employee

on their primary work responsibilities during this review period. The key responsibilities and the supporting duties can be found in the position description. Refer to the position description as you write this section of the performance evaluation. 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 rating has an overall rating weight of 25%. Descriptions of each rating can be found on the Performance Management page [here](#).

Goals

In this section, you reflect on the outcome of your goals during this review period.

1. Enter Goal(s) if not already entered. OR Place a check mark (✓) under Use Existing Goal. This allows you to pull in a goal cascaded from your supervisor/manager or added during the review period.

Use Existing Goal



- a. Click on the Menu in the open field box.
- b. Select the goal.
- c. Goal populates.
- d. Enter a rating under **Employee Evaluation** and enter comments about this goal. Description of each rating can be found on the Performance Management page [here](#).
- e. Comments are required as noted by the **red asterisk (*)**.
- f. Click Add to bring in additional goals.

- g. Review each Goal and enter a **Comment** that describes your progress towards the Goal.
- h. Under **Summary**, your rating for this section is automatically calculated based on the selected evaluation ratings. Please note that this rating has an overall rating weight of 25%.

2. You can enter goals if not already created during this review period.

Goal *

- a. Enter a goal in the open text box.
- b. The following are optional to complete:
 - i. Description – enter a description/background information about a goal
 - ii. Category – you can select more than one category that best fits the goal
 - iii. Supports – select how the goal aligns with the one of the College’s strategic plan goal
 - iv. Due Date – enter a completion date of the goal
 - v. Status – select from the four options of the goal status
- c. Click Add to enter another goal and follow steps a-b.
- d. Review each Goal and enter a **Comment** that describes your progress towards the Goal.
- e. Enter a rating under **Employee Evaluation** and enter comments about this goal. Description of each rating can

be found on the Performance Management page [here](#).

Competencies

In this section, review the Collegewide competencies. You will rate each competency under **Employee Evaluation**. Select the evaluation proficiency rating from the drop-down menu that best describes your actions/behavior of the competency. Descriptions of each rating can be found on the Performance Management page [here](#).

The Comment text box is not required to be completed. You can provide comments to describe why the proficiency rating was selected.

Under the **Summary** section, the Proficiency Rating is automatically calculated based on the ratings of the Collegewide competencies. Please note that this rating has an overall rating weight of 50%.

Professional Development Goals

In this section, enter your Professional Development Goals.

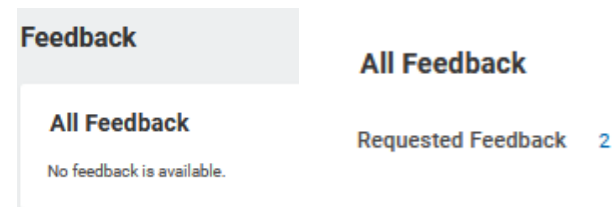
1. Enter a Professional Development Goal(s) if not already entered. OR Place a check mark (✓) under Use Existing Professional Development Goal. This allows you to pull in a previously created Professional Development Goal.
2. Review each Professional Development Goal.
3. The following are optional to 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 a 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 and is not rated.

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”.



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. Click Add.
2. Click Attach.
 - a. Find your document.
 - b. Select the document.
 - c. Click Open.
 - d. Document is attached.
 - e. Click the check mark found at the right hand corner to save.



- f. Repeat steps 1-2 to add more documents.

Overall

This section is optional and provides an opportunity to include additional comments about performance not stated elsewhere in the evaluation.

Click the Pencil to open the Comment box or click underneath Comment for the text box to appear. Enter comments. Click the check





mark to save entered text.

Complete Self Evaluation

This section provides an opportunity to review the self-evaluation and

allows for edits, changes, and corrections. Use the pencil  to

make edits and the check mark  to save. Use the arrow  to undo an action.

1. At this stage of the probation review, 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 remain in your **Inbox** as a task until you are ready to Submit
 - c. Close – a window appears stating: Changes Save. You're leaving this task. Your changes are saved.
 - i. Click Cancel or OK.
 - ii. OK will end this task. Task remains in your Inbox.
2. Hit Submit when you are ready to send the Performance Review to your supervisor/manager for their completion.
 - a. A separate window appears with the following message:
Success! Event submitted.
Up Next: Name of your Supervisor, Set Review Get Additional Manager Evaluation
View Details
 - b. View Details provides you a view of the Annual Performance Review and Process.