

### Overview

Use this job aid as a resource to complete the Manager/Supervisor steps of an employee’s 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.

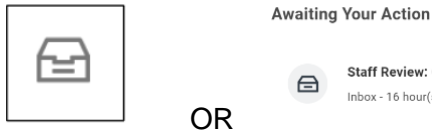
When an employee completes and submits their self-evaluation, the supervisor/manager receives a Workday Inbox task to complete the Staff Review. The first task is to **Get Additional Manager Evaluation**.

**(Optional) Get Additional Manager Evaluation** In this task, you have the option to add an additional Manager to review the employee or you can skip this task altogether. If this feature is accidentally submitted, contact the Workday Talent Administrator to remove this task.

**Note:** If you choose to use the Get Additional Manager Evaluation feature, **do not begin** your part of the performance review until you have received notification that the additional reviewer(s) under the Additional Manager Evaluation have completed the evaluation. **Their evaluation comments will not be visible to you if you start the evaluation before theirs is completed.**

### Performance Review Evaluation

1. From the **Home** Screen, click the **Inbox** icon in the upper right hand corner or from the Awaiting Your Action box.

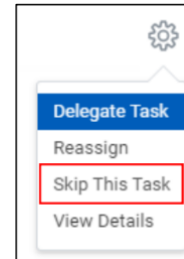


2. Select the **Staff Review:** Employee Name
3. **Get Additional Manager Evaluation**
  - Select the applicable Reviewers by typing their name.  
**Note:** You can select one or more people.
  - Click **Submit**. **OR**

- **Skip this task**
  - i. Towards the top right of the Inbox task, locate the toolbar and click the Gear icon.



- ii. From the menu, click **Skip This Task**.



- iii. A confirmation displays asking if you wish to skip

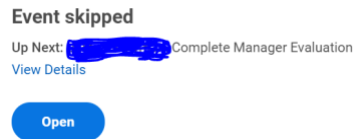
## Complete Manager Evaluation for Staff Annual Performance Review

### Workday Job Aid for Manager/Supervisor

this task. Click **OK**.

**Reminder: Do not begin** your part of the performance review until you have received notification that the additional reviewer(s) under the Additional Manager Evaluation have completed the evaluation. **Their evaluation comments will not be visible to you if you start the evaluation before theirs is completed.**

A window pops-up: **Event skipped** Up Next: Manager name, Complete Manager Evaluation. Click Open.



Click **Open** if you are ready to start to complete the evaluation, skip to #4 below.

## Complete Manager Evaluation

1. From the Home Screen, click the Inbox icon.



2. Locate and select the **Manager Evaluation** task.
3. Read the **Introduction** at the top of the page.
4. Select one of the following options:
  - a. **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. 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 follow the instructions for each section as needed.

**Important: Do not begin** your part of the performance review until you have received notification that the additional reviewer(s) under the Additional Manager Evaluation have completed the evaluation. **Their evaluation comments will not be visible to you if you start the evaluation before theirs is completed.**

## Primary Work Responsibilities

In this section, you are able to view the employee's response (self-evaluation) on their primary work responsibilities during this review

period. Click on the pencil  to enter your comments about the employee's primary work responsibilities during this review period.

Use the check mark  to save your comments. Use the arrow  to undo an action.

Under Summary, you are able to view the employee's rating of their primary work responsibilities. As manager, enter the manager evaluation of employee's primary work responsibility. Review the definition of the rating categories on the Performance Management page [here](#). This Section is weighted 25% of the performance


evaluation.

### Goals

In this section, you are able to review the goal(s) entered by the employee.

1. Use the pencil in the Goal section to make edits.



2. Edits, if needed, can be made to:
  - a. Category – you can select more than one category that best fits the goal
  - b. Supports – select how the goal aligns with the one of the College’s strategic plan goal
  - c. Due Date – enter a completion date of the goal
  - d. Status – select from the four options of the goal status
  - e.  Use this to save the edits.
3. Use the Add button to add goal(s) to the probation review, if needed, and follow the instructions below:
  - a. Enter Goal(s). OR Place a check mark (✓) under Use Existing Goal. This allows you to pull in a goal.
  - 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.

4. Employee evaluation of goals is visible along with any written comments. Enter the manager evaluation rating here and enter comments. Comments are required as noted by the red asterisk (\*). The Goals section is weighted 25%.

### Competencies


In this section, a manager can view the employee’s evaluation of each competency along with any comments. A manager enters their evaluation of each competency along with written comments. Comments by the manager are required as designated by the red asterisk (\*). View the definitions and examples of each competency on the Performance Management webpage [here](#). Use the pencil to edit; the check mark to save; and the arrow to undo action.

Under Summary, the system calculates the overall rating for Competencies. The overall weighting of this section is 50%.

### Professional Development Goals

In this section, you are able to review the Professional Development Goals entered by the employee.



1. Use the Pencil icon  in the Professional Development Goal section to make edits.
2. Edits, if needed, can be made to:
  - a. Category – you can select more than one category that best fits the goal

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- b. Start Date – enter a start date of the goal
- c. Due Date – enter a completion date of the goal
- d. Status – select from the four options of the goal status
- e. Status Note – enter notes about the status of the goal

f. Use the checkmark  to save the edits.

- 3. Use the Add button to add goal(s) to the evaluation and repeat steps 2.
- 4. Under Summary, the employee provides additional comments, if needed. The manager enters additional comments using the pencil, if needed, and not stated elsewhere in the evaluation. Use the check mark to save comments. This section of the evaluation is not weighted.

### Feedback

In this section, any feedback the employee has received displays. If they have not received feedback, then the section will be blank. If applicable, carefully review all feedback the employee has received. Click on the blue hyperlink number to view Feedback.

All Feedback	
Anytime Feedback	<a href="#">1</a>
Requested Feedback	<a href="#">5</a>

Anytime feedback is unsolicited feedback to the employee.

Requested feedback is a request made by the employee or the manager. An employee can decline a request for feedback. Options to

provide feedback can be:

- a. Share only with Manager
- b. Share only with the employee who is requesting the feedback
- c. Share with Others (this will include everyone in the management chain.)

**Note:** If requested feedback has not yet been complete, the manager can still proceed with the performance evaluation.


### Supporting Documents

In this section, any supporting documentation uploaded by the employee displays. You have the option to attach any additional supporting documentation.

- 1. Review the attached Documents for Review.

**Note:** continue with the remaining steps if you wish to attach additional documentaiton.

- 2. Click **Add**.
- 3. Click **Attach**.
- 4. Select the applicable file from your computer.
- 5. (Optional) Enter a **Comment** to describe the attachment.

- 6. Click the **Checkmark** icon  to save the attachment.  
Note: Repeat these steps for each item you wish to attach.

### Overall

In this section, the employee and manager can include additional comments about performance not stated elsewhere in the evaluation. You can view additional comments the employee entered.

Under the Manager Evaluation, you will see the Rating calculated by the system. Click Next if there are no edits to the calculated rating.

## Manager Evaluation

Rating \*

Exceeds Performance

I want to change the Rating:

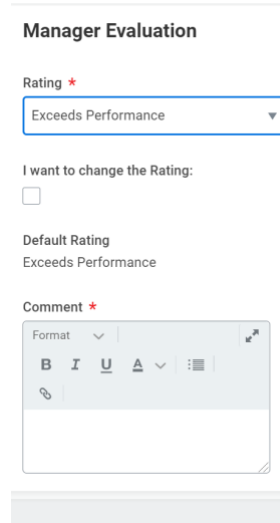
No

Default Rating

Exceeds Performance

Comment \*

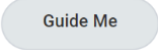
Use the Pencil icon  to make edits to the rating.



1. Under Rating, the select the new rating.
2. A check will autopopulate the text box underneath “I want to change the Rating:”
3. The new selected rating along with the Default Rating is visible.
4. A comment is required (\*) and **MUST** be entered into the comment box the reason for the change in rating.
5. Click the Checkmark icon to Save.
6. Clcik Next.

## View Complete Manager Evaluation

This is an opportunity to review comments and ratings in each section and make edits, if needed. Two options are available to view. First option is to scroll down the page or use the Guide Me button located



up towards the right. Click on this button and it will take you through section by section. Once you navigate through each section, you have the options to Submit, Send back, Save for Later, or Close.

# Complete Manager Evaluation for Staff Annual Performance Review

## Workday Job Aid for Manager/Supervisor

Submit Send Back Save for Later Close

**Submit:** By clicking on this first Submit, you are submitting the performance evaluation for viewing and printing.

### Success! Event submitted

Up Next: Manager, Meet with your employee.

[View Details](#)

To Do

You Workday Inbox will have **Complete To Do: Meet with your employee**

Please meet with the employee to discuss the evaluation.

1. Set-up a meeting with the employee to review the performance review.
2. Click on the View Printable Employee Review button to create a copy of the performance review.

View Printable Employee Review

#### View Printable Employee Review

Employee Review \*

OK Cancel

Enter Employee Name in text box. Click OK. View performance evaluation online. Top right side, click on the PDF icon to create a

PDF of the Performance Evaluation.

#### Print Document

A printable Review Document is being generated. When your file is ready for download, you will be able to access the document from the notification link next to your sign-in name or from the My Reports task.

OK

Click OK.

3. Once you have met with the employee, you can now hit the Submit button. **Note:** If after meeting with the employee and additional changes are needed, DO NOT HIT SUBMIT, contact the **Talent Administrator**. At this stage of the evaluation process, a manager/supervisor nor employee can make any additional changes to the evaluation. There should not be changes at this point. Evaluation is ready for Acknowledgement by the employee and manager/supervisor.

**DO NOT HIT THE SUBMIT BUTTON!** Hitting the Submit button will release the performance review to the employee.

The second **Submit** - Submission of this task will release the evaluation to the employee in Workday and prompt them to acknowledge the evaluation.

A pop-up window with: **You have marked as Complete. Up Next:** Employee Name, Provide Employee Review Comments.

[View Details](#)

Employee's Workday Inbox receives the Provide Employee Review Comments and Acknowledges the Performance Evaluation. Once employee acknowledges and submits evaluation, the manager receives a Workday Inbox item - Staff Review: Employee Name – Complete Manager Evaluation.

# Complete Manager Evaluation for Staff Annual Performance Review

## Workday Job Aid for Manager/Supervisor

### Manager Acknowledgement

Under Status, select Acknowledge Review without Comments or Acknowledge Review with Comments. If the latter is selected, enter comments into the Comment text box. Use the **Checkmark** to Save.

#### Manager Acknowledgement

Status \*

Comment

Format  **B** *I* U **A**

Click Submit. Performance Evaluation is completed.



**Success! Event submitted**

[View Details](#)

Click on Performance under the navigation pane of the employee profile to view the completed performance evaluation.

**Send Back:** This option allows you to send the evaluation back to the employee. A pop-up window appears for you to enter the employee's name and the reason for sending the evaluation back.

### Send Back

To \*

Reason \*

**Save for Later:** A pop-up window states: “**Event Saved. Awaiting Submission.** Up Next: Manager Name, Complete Manager Evaluation. View Details [Open](#)”

**Close:** Use to exit the performance evaluation.

Employee Performance Evaluation is completed when employee and manager acknowledges the evaluation. Completed evaluation is found under the employee's performance tab.

**Complete Manager Evaluation for Staff Annual Performance Review**  
*Workday Job Aid for Manager/Supervisor*