Complete Manager Evaluation for Staff Annual Performance Review

Workday Job Aid for Manager/Supervisor

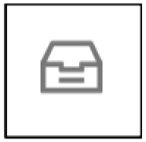
Overview

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.

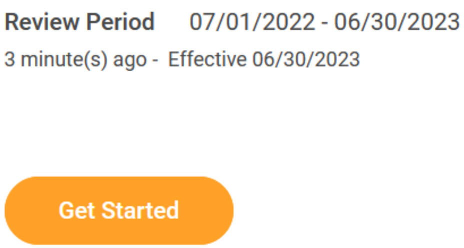
When an employee completes and submits their self-evaluation, the supervisor/manager receives a Workday Inbox task to complete the Staff Review.

Complete Manager Evaluation

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



2. Locate and select the **Manager Evaluation** task.
3. Click on Get Started.



Review Period 07/01/2022 - 06/30/2023

3 minute(s) ago - Effective 06/30/2023

4. 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.
5. Click Next at the bottom of the page to move to the next section.

Primary Work Responsibilities

In this section, **1)** you are able to view the employee's response (self-evaluation) on their primary work responsibilities during this review period, **2)** you provide an assessment of performance during this review period, highlighting strengths and areas for opportunity. 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, and **3)** include comments about the applicable training completed for this fiscal year.

Under **Manager Summary**, enter the rating for primary work responsibility. Review the definition of the rating categories on the Performance Management page here. This Section is weighted 33.33% of the performance evaluation.

Click Next at the bottom of the page to move to the next section. A pop-up window states that your changes have been saved.

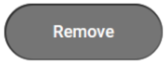
Goals

On this page, you have the opportunity to reflect on the employee's 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 the evaluation.

.1. Edits, if needed, can be made to:
  a. Goal text box
  b. Description text box
  c. Due Date – enter a completion date of the goal
  d. Category – you can select more than one category that best fits the goal
  e. Supports – select how the goal aligns with one of the College’s strategic plan goal
  f. Status – select from the four options of the goal status
  g. Follow the above steps for each goal.

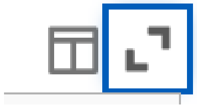
2. Employee evaluation of goals is visible along with any written comments. Enter the manager evaluation rating here and enter comments.
3. Summary provides the overall rating for the Goals section. Workday calculates the Manager and Employee Evaluation rating of this section based on the selected rating of each goal.
4. The Goals section is weighted 33.34%
5. Click Next at the bottom of the page to move to the next section.
6. To remove a goal click the Remove button.



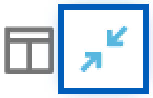
Competencies

For each competency, choose an appropriate rating from the dropdown menu provided. A red asterisk (*) denotes a required field. While adding comments is optional, it can help provide context and specific feedback.

Use the double arrows to expand this page.



Use the double arrows to revert back to its original format.



View the definitions and examples of each competency on the Performance Management webpage here.

Under **Manager Summary**, the system calculates the overall rating for Competencies based on each competency rating selected. The overall weighting of this section is 33.33%.

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

Competencies Specific Feedback

A red asterisk (*) denotes a required field.

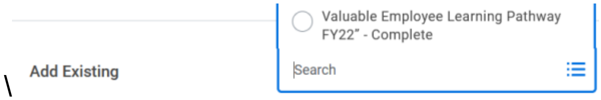
1. Provide feedback on competency-related strengths.
2. Provide feedback on competency-related opportunities for growth and improvement.

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

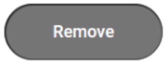
Professional Development Goals

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

1. Edits, if needed, can be made to:
   a) Category – you can select more than one category that best fits the goal
   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
2. Use the Add button to add goal(s) to the evaluation.
   a. Add a goal by entering it into the Professional Development Goal text box **OR** pull an existing goal by using the Add Existing goal feature.

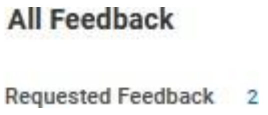


   b. If using the existing goal feature all the information will auto-populate.
   c. If manually adding a goal, enter information in the required fields as noted by the red asterisk (*)
3. Remove a goal by clicking on the Remove button.



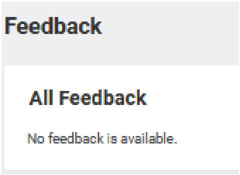
4. Under **Manger Summary**, employee additional comments are visible if entered by employee. If needed, the manager enters additional comments, if not stated elsewhere in the evaluation. This section of the evaluation is not weighted.
5. Click the Next button at the bottom of the page to advance to the next section.

Feedback


All Feedback

Requested Feedback 2

In this section, any feedback the employee has received displays, if it is shared with All (employee, manager, and management chain). If they have not received feedback, then the section will be blank – no feedback is available. If applicable, carefully review all feedback the employee has received. Click on the blue hyperlink number to view Feedback.


Feedback

All Feedback

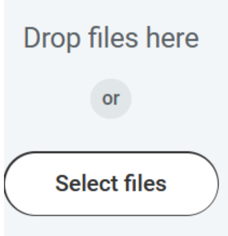
No feedback is available.

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

Supporting Documents

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

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.

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    g. Click Next at the bottom of the page to move to the next section.
2. Review the attached Documents.
3. Click Next at the bottom of the page to advance to the next section.

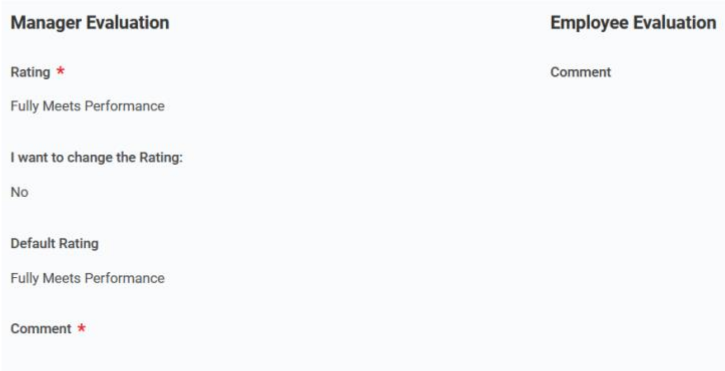
Overall

Comments not required.

If the overall rating is less than fully meets then a comment is required.

In this section, 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 *

Fully Meets Performance

I want to change the Rating:

No

Default Rating

Fully Meets Performance

Comment *

Employee Evaluation

Comment

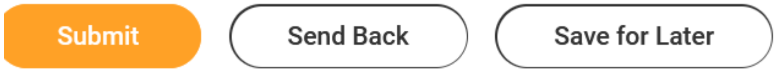
Note: Do not use the “Override Calculated Rating” feature. Best practice is to review the ratings in the performance evaluation and make adjustments, as needed. If this feature is used, it will display the Default Rating Workday calculated along with the changed rating entered.

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

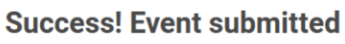
Review and Submit - View Complete Manager Evaluation

This is an opportunity to review comments and ratings in each section and make edits, if needed. Use the scroll bar to the right of the page to navigate up and down the review. Or, quickly navigate to a section of the review using the left navigation pane and select the section to move to quickly.

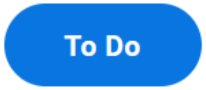
Once you navigate through each section, you have the options to Submit, Send back, or Save for Later.



When you click on Submit, your next task is to schedule a meeting with your employee to discuss their evaluation.

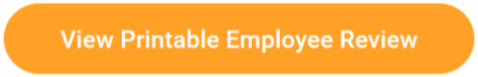

Success! Event submitted

Up Next: Manager Name|Meet with your employee

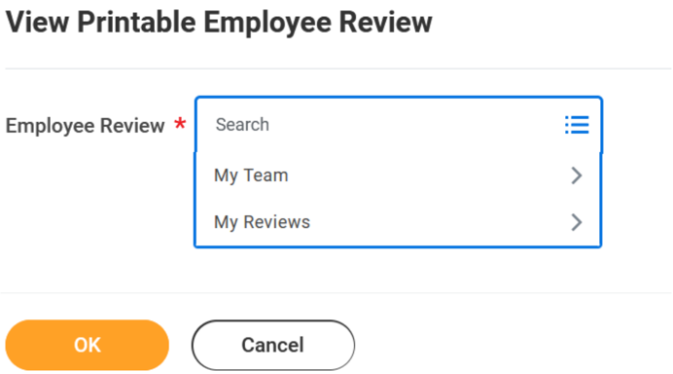


Meet with the employee to discuss the evaluation.

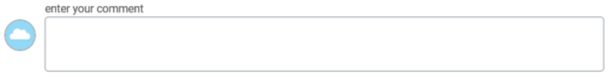
1. Set-up a meeting with the employee to review the performance review.
2. Click on the View Printable Employee Review button to create a copy of the performance review.



3. Enter employee name into Employee Review field box.


View Printable Employee Review

4. Click OK after entering the employee name.
5. Once the employee's name populates the Employee Review field box, Click OK.
6. Once you have met with the employee, enter the date you met with the employee in the Enter Your Comment text box.



Note: If after meeting with the employee and additional changes are needed, **DO NOT HIT SUBMIT**, contact the **Talent Administrator**. The Talent Administrator will work with you to make the changes.

A second submit button will release the performance evaluation to the employee to view your comments and ratings. If you are not ready to release the evaluation to the employee - **DO NOT HIT THE SUBMIT BUTTON!**

Once any changes are made and ready to share the performance evaluation with the employee to review and acknowledge, you are now ready to hit the second (2nd) Submit button.

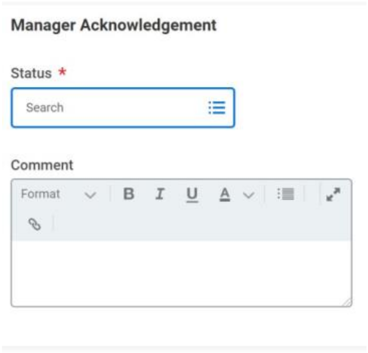
The second **Submit** - Submission of this task will release the evaluation to the employee in Workday and prompt them to acknowledge the evaluation.

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.

Manager Acknowledgement

1. From the Home Screen, click the Inbox icon.
2. Locate and select the **Manager Evaluation: Staff Review FY23** task.
3. Read the statement at the top of the page: *I have reviewed the evaluation with the employee. We have discussed their proposed FY24 performance Goals and career/professional development goals. I acknowledge that this document reflects my evaluation of the employee's performance and that it is accurate and true.*
4. Click 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 you comments and ratings along with the employee's self-evaluation.
8. Click Next.
9. View Acknowledgement comments by employee, if entered.
10. As manager, acknowledge with or without comments.
    a. Select an option from the drop-down menu
        i. Acknowledge Review without Comments **OR**
        ii. Acknowledge Review with Comments
    b. If you select Without Comments, skip the Comment text field box.
    c. If you select With Comments, enter your comments in the Comment text box.



11. Click Save for Later to come back later. **OR**
12. Click Submit.
13. A pop-up window states Success! Event Submitted.
14. Acknowledgement by you and your employee moves the FY23 Performance Review to completed.