Complete Employee Probation Review
Workday Job Aid for Employees Eligible for a Probation Review

Overview

Use this job aid as a resource to complete an employee’s Six-Month Performance Evaluation (Probation Review). A probationary period is that period of time that an employee is required to serve in a position to demonstrate his or her knowledge, skills and ability to perform the duties of said position satisfactorily. Probationary periods are required for all new hires, and for regular staff who are promoted or transferred into a different job class, and for temporary employees who are promoted or transferred into a regular position. (P&P 33004CP) During this period, an employee is given feedback about job performance, job and performance expectations, review of collegewide competencies, discussion of goals, and professional development.

The Talent Administrator initiates an employee’s Six-Month Performance Evaluation (Probation Review). The probation review routes to the manager/supervisor to enter performance (individual goals) and professional development goals discussed during the onboarding process. Once the manager/supervisor enters and submits the goals, the employee is able to view the entered goals. The manager/supervisor must notify the employee to log-in to Workday to view goals.

Please Note: An employee self-evaluation is not part of the probation review process.

Performance Review Evaluation

1. From the Home Screen, at the top right-hand corner, click on your profile.

2. Click on View Profile.

3. From the left navigation pane (purple) scroll down to Performance.

4. Click on Performance.
Under the Reviews tab, an employee can see the Probation Review 2 In Progress.
Complete Employee Probation Review  
*Workday Job Aid for Employees Eligible for a Probation Review*

a. Scroll to the right and Click on View.  
b. A navigation pane to the left outlines the sections of the probation review.  

c. This is the Set Content Review step – each section is visible. An employee can view the goals entered by the manager/supervisor.  

d. Click on summary.  
e. Click on OK

- **Primary Work Responsibilities**: No comments by the manager/supervisor at this time.  
- **Goals**: View performance (individual) goals discussed during onboarding and entered by the manager/supervisor.  
- **Competencies**: View the seven (7) competencies an employee will be evaluated during the probationary period.  
- **Professional Development Goals**: View the goals discussed and entered by the manager/supervisor for this probationary period.  
- **Summary**: Employee can view the full probation review. Click on OK.
Complete Employee Probation Review

Workday Job Aid for Employees Eligible for a Probation Review

Manager Completes Probation Review

The manager/supervisor will enter comments and ratings of each section of the probation review. The sections are:

**Primary Work Responsibilities**
1. Manager/supervisor enters comments about primary work responsibilities during the 6-month probationary period.
2. This section is weighted 50% of the probation review.

**Goals**
1. Manager/supervisor enters comments about each goal during the 6-month probationary period.
2. This section is weighted 25% of the probation review.
3. If there are no goals, this does not impact the overall probation review rating.

**Competencies**
1. Manager/supervisor rates and enters comments for each competency.
2. This section is weighted 25% of the probation review.
3. Based on the selected rating for each Competency, Workday calculates the Overall Rating for Competencies under Manager Summary.

**Professional Development Goals**
1. Comments are not required by the manager to enter into this section.
2. This section is not weighted.

**Feedback**
If feedback was given to an employee during the 6-month probationary period and shared with ALL, feedback will auto-

populate into the probation review and visible.

**Supporting Documents**
A manager/supervisor is able to upload documents into the probation review that are relevant to the probationary period.

**Overall**
This section provides the Overall rating calculated by Workday of the probation review based on the ratings and weight for the three sections: Primary Work Responsibilities, Goals, and Competencies.

**Manager Schedule Meeting**
Manager schedules a meeting with employee to discuss probation review.
1. Manager can provide a printed copy of the probation review during meeting; OR
2. Manager can view online in Workday the probation review with the employee.
3. After the meeting, the manager/supervisor release the probation review to the employee to acknowledge.

**Acknowledgment**
An acknowledgement by employee and manager/supervisor can be with or without comments.

**Employee Acknowledgement Statement:** 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.
Manager Acknowledgment Statement: I have reviewed the evaluation with the employee. We have discussed their 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.

Once the employee acknowledges the probation review, it routes back to the manager/supervisor for their acknowledgment.

Both acknowledgements move the probation review from In Progress to Completed.

Additional Goals

An employee can enter performance (individual) and professional development goals at any time by going to Performance and under the tabs Goals and Professional Development Goals. Performance Goals entered will route to the manager/supervisor for approval. Professional Development Goals do not route to the manager/supervisor for approval.

1. Click on Individual Goals.
2. Click on Edit.
3. Click on Add.
4. Enter goal in Goal Field.
5. The following fields are not required but encouraged to complete.
   a. Description – brief explanation/clarification of goal
   b. Category – select 1 or more category
   c. Status – select 1 status
   d. Supports – how this goal supports the College strategic goals, can select more than 1
   e. Due Date – date of completion of the goal
   f. Click Submit