Complete Manager Evaluation for Employee Probation Review
Workday Job Aid for Manager/Supervisor

Overview

Use this job aid as a resource to complete the Manager/Supervisor steps of the staff Probation Review (Six-Month Performance Evaluation). The Talent Administrator launches an employee probation review. The **first task** for the Manager/Supervisor is the Set Content Probation Review step by entering performance goals (Individual Goals) and professional development goals discussed during the onboarding process for the 6-month probationary period. The **second task** for the Manager/Supervisor is the Complete Manager Evaluation task where a manager/supervisor enters comments and ratings about an employee's performance during the probationary period.

Please note: (a) If an employee is not meeting performance expectations the first few weeks/months, to contact a Human Resources Internal Consultant (HRIC) for guidance. **(b)** If the probation review recommendation is to extend probationary period or terminate, contact Employee Engagement and Labor Relations (EELR) at performance@montgomerycollege.edu at least 30 days prior to due date of the probation review. Review, disposition of recommendation to extend probationary period or terminate employee, and notification by manager/supervisor to employee must be made prior to the probation review due date.
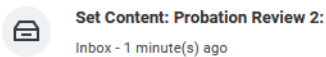
Performance Review Evaluation

1. From the **Home** Screen, click the **Inbox** icon in the upper right hand corner.

2. Select the **Set Content: Probation Review**: Employee Name

Awaiting Your Action

Set Content: Probation Review 2:
Inbox - 1 minute(s) ago

Go to All Inbox Items (1)

3. Read the **Introduction** at the top of the page.

Review Period   01/23/2023 - 07/22/2023
1 minute(s) ago - Effective 07/22/2023

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.

Get Started

4. Click Get Started

A navigation pane to the left outlines the sections of the probation review. You can also use this pane to more quickly navigate to a section.

Actions
01/23/2023 - 07/22/2023

○ **Primary Work Responsibilities**
○ Goals
○ Competencies
○ Professional Development Goals
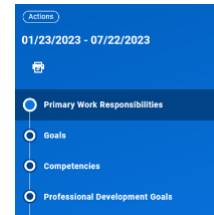
Primary Work Responsibilities

a. <u>View only</u> at this step. You are unable to enter comments in this section at this time.

b. Click Next.

Goals

The manager/supervisor can enter goals prior to the launch of the probation review OR within the Set Content Review step. An employee can also enter goals under Performance. Goals entered by an employee will route to the manager/supervisor for approval.

Goals entered prior to the launch of the Probation Review, will automatically populate into the probation review. However, if it does not, follow the steps below to bring them into the probation review.

1. Click on the Menu icon in the field box next to Adding Existing.
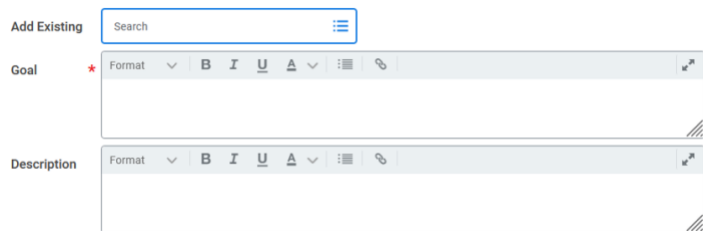
2. Use the right carrot by All Valid Goals for Selection and select the goal(s) to bring in.
3. Click Next.
4. A pop-up window: Your changes are saved.
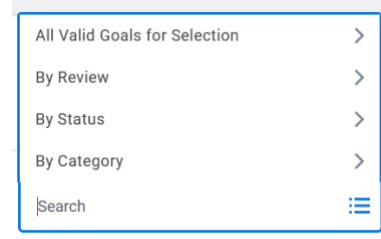
5. Entering goals within the Set Content Review, follow the steps below:
    a. Click Add.
    b. Add 1st Goal
    c. All other field boxes are not required:
        i. Description: provide an explanation or clarification of the goal
        ii. Due Date: enter a completion date of the goal
        iii. Category: You can select more than one category that best fits the goal.
        iv. Supports: select how the goal aligns with the one of the College's strategic plan goal
        v. Status: Select one status
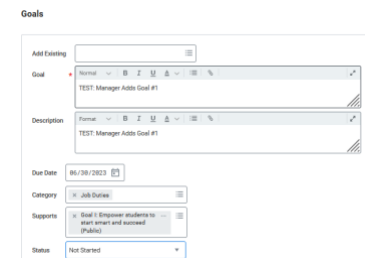
    d. Click add if there are more goals for the probation period and follow steps ci-cv.
    e. Click Next when all goals are entered.
    f. Pop-up box: Your changes have been saved.

Competencies

In this section, you can view the seven Collegewide competencies. You do not complete this section of the review at this time. This section provides a preview of how you will evaluate an employee on each competency.

Professional Development Goals

The manager/supervisor can enter goals prior to the launch of the probation review OR within the Set Content Review step. An employee can also enter goals under Performance. Professional Development Goals entered by an employee will not route to the manager/supervisor for approval.

Goals entered prior to the launch of the Probation Review, will automatically populate into the probation review. However, if it does not, follow the steps outlined above in **Goals** on page 2.

Review and Submit

This is an opportunity to review what you entered into the Probation Review form. You have the following options:
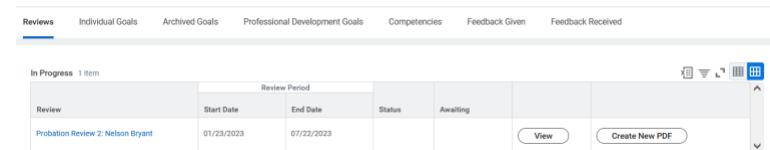
1. **Submit** – a window appears with the following message: Event Saved. Awaiting Submission. Up Next: Manager Name|Set Review Content.
   a. When you return to the Saved Set Content Review,
      i. Use the left navigation bar to go to the section to view and edit if needed.
      ii. Use the left navigation bar to go to the Review and Submit Section.
      iii. Click Submit.
      iv. Pop-up window: Success! Event submitted.
         a. Up Next: Manager Name|Complete Manager Evaluation.
   b. You can Click Open and begin to enter comments and ratings. OR Return at a later time.

Note: Employee does not receive a notification that goals are entered. Manager must notify employee through conversation or email to log-in to Workday. Provide the following instructions, if needed.

1. From the View Profile, scroll down the left navigation pane to Performance.
2. Click on Performance.
3. Under the Reviews tab, employee is able to see Probation Review in Progress.
4. Click on View.
   a. Employee is able to see goals in the Set Content Review.

   b. Click Close or OK.

Manager Evaluation: Probation Review 2

From the manager/supervisor's Workday inbox, Click on the task **Manger Evaluation**.

1. Click on Get Started.

Primary Work Responsibilities

2. Enter comments about primary work responsibilities. This is a required field noted by a red asterisk (*).
3. Enter the rating for Primary Work Responsibilities. This is a required field noted by a **red** asterisk (*).
   a. This is weighted 50% of the employee's review.
4. Click Next.
5. Pop-up window: Your changes have been saved.

Goals

1. View each goal and enter rating and comment. Both are required fields noted by a **red** asterisk (*).
2. This section is weighted 25% of the review.
3. If there are no goals, this does not impact the overall review rating.
4. Click Next or Save for later or Close.
5. Save for Later or Close: Pop-up window: Event Saved. Awaiting submission.

Competencies

1. Enter Proficiency Rating and Comment for each competency. Both are required fields noted by a red asterisk (*).
2. This section is weighted 25%.
3. Based on the selected rating for each Competency, Workday calculates the Overall Rating for Competencies under Manager Summary.
4. Click Next.
5. Pop-up box: Your changes have been saved.
   .

Professional Development Goals

1. View each professional development goal.
2. Enter updates such as Start Date, Completion Date, or Category, if needed.
3. Manager Summary – Provide a comment, although not required.
4. This section is not weighted.
5. Click Next, Save for Later or Close.
6. Pop-up window.

Feedback

Feedback given and designated as Share with All during the probationary period populates into the probation review.

1. This section will be blank if no feedback is given.
2. If Feedback is available, click on the blue number to view.
3. Click Next.

Supporting Documents

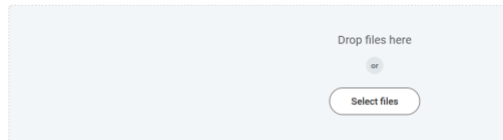Documents can be uploaded into the probation review by following the steps below:

1. Upload documents by Clicking on Select Files.

Supporting Documents

Manager

2.
3. Go to where the file is saved. Click Open.
4. Document uploaded to review.
5. Field to enter comment, if needed.
6. Click on Upload to add more documents, OR
7. Click Next.
8. Pop-up window: Your changes have been saved.

Overall

Important to notify Employee Engagement and Labor Relations if you recommend to extend probationary period or to terminate.

1. Comment Field is required.
2. Click Next.
3. Pop-up window: Your changes have been saved.

Review and Submit

Opportunity to review and make edits.

1. If edits are needed, use the left navigation pane to select the section.
2. Make the edit.
3. Click Next.
4. Pop-up window: Changes have been saved.
5. After all edits are made, from the left navigation pane, click Review and Submit.
6. Review again.
7. Click Submit.
8. Pop-up window: Success. Event Submitted.

NOTE: The employee is <u>not</u> able to view any comments or ratings entered. Only the goals entered are visible in the probation review.

To Do – Meet with Employee

Schedule a meeting with employee to review and discuss probation review. Options to view the probation with employee:

1. Print a copy to share with employee during meeting.
2. View online in Workday during meeting.
3. After meeting with the employee, use the field box to enter the day and time of meeting.

<u>DO NOT HIT THE SUBMIT BUTTON!</u> Until after meeting with the employee to discuss the performance review.

4. Click Submit. This releases the probation review to the employee for their acknowledgement.

Congratulations! The probation review is completed.

Acknowledgement

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.