Managers Complete Performance Reviews

Important Information:

- After the performance review templates are launched the Employee receives an inbox task to Complete Self Evaluation and the Manager receives an inbox item to **Get Additional Managers (this is optional and can be skipped)**
- After the Employee has completed the Self Evaluation, the Manager receives and inbox item to add **Additional Reviewers (this is optional and can be skipped)**
- **Additional Managers** can provide comments (**no ratings**) on all sections of the Employee's evaluation while **Additional Reviewers** can provide comments and ratings but **only on the competencies section** of the evaluation.
- It is a best practice for the Manager to wait until the Additional Managers and Additional Reviewers (**if one or both steps are not skipped by the Manager**) have completed their tasks before completing the Employee's evaluation, although this is not required.
- Existing goals on the Employee profile will be locked for editing once the Performance Review is launched. However, goals can be added and existing goals can be edited from within the performance review inbox task. Changes will populate onto the Employee's worker profile when the performance review is complete

Get Additional Manager Evaluation

Additional Managers have visibility to all sections of the Employee Performance Review and are able to provide comments on each item within each section. However, they cannot rate the Employee.

NOTE: Additional Manager comments are visible to the Employee, Manager, Management Chain and Human Resources.

1. Click on the "Staff Performance Review (Self-Evaluation)" action item for the Employee in your inbox.
2. Read the information for "Get Additional Manager Evaluation" in the text of the inbox task.

    NOTE: You may skip this step by clicking the gear icon and by selecting **Skip This Task**
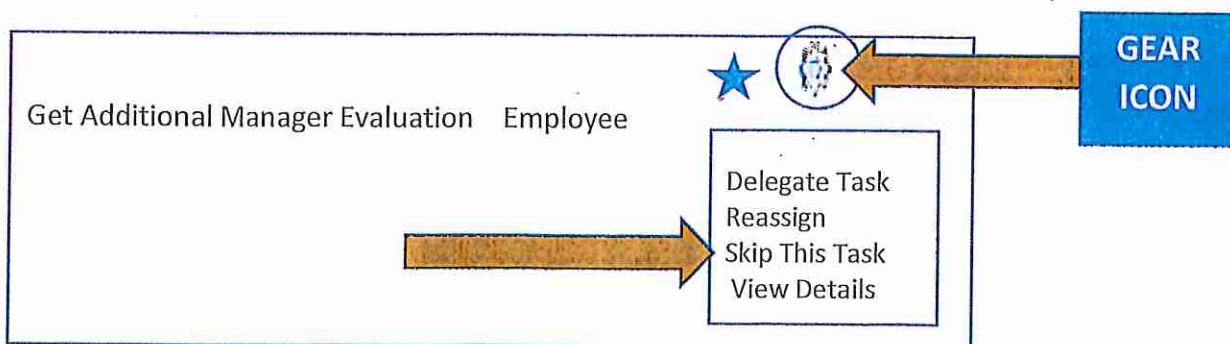
3. Click in the Reviewers field and enter the names of individuals you would like to add as Additional Managers

Get Additional Manager Evaluation Bill Employee

REVIEWER

Action

NOTE: It is helpful to enter the UIN to ensure you have selected your intended person. Some individuals may have the names that are more common than others.
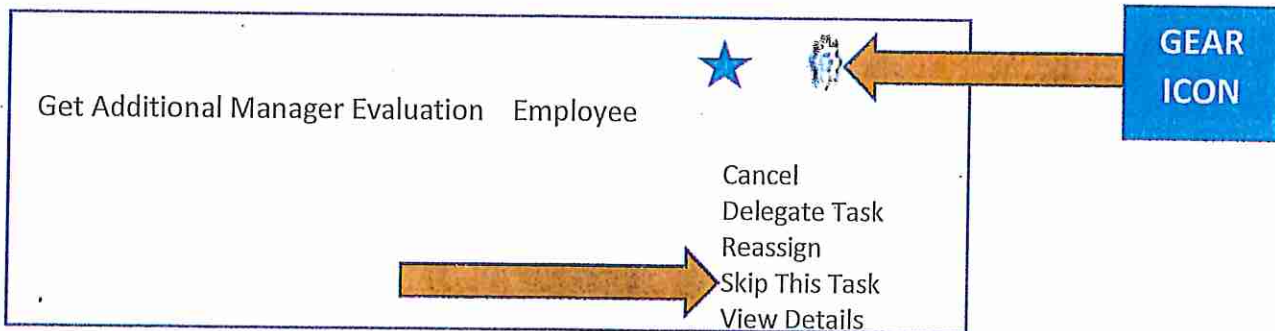
4. Click **Submit**

The Additional Managers you selected will receive an inbox item to add comments to all parts of the Evaluation for the Employee. The completion of their tasks will not delay your evaluation. It is recommended that you communicate with Additional Managers to coordinate submission of her comments.
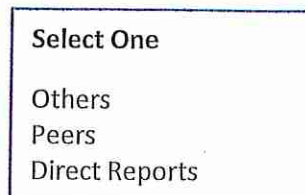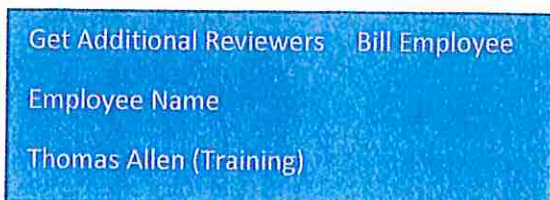
Get Additional Reviewers

Once the Employee has submitted their Self-Evaluation, the Manager will be prompted to select Additional Reviewers. Additional reviewers added by the Employee's Manager have the ability to rate and comment on competencies. They do not have the ability to see other sections of the performance review.

5. Click the "Staff Performance Review (Self Evaluation) action item for the Employee in your inbox
6. Read the information for "Get Additional Reviewers"

NOTE: The Manager may skip this step by clicking the gear icon and by selecting **Skip This Task**

Get Additional Manager Evaluation   Employee

GEAR ICON

Cancel
Delegate Task
Reassign
Skip This Task
View Details

7. Enter the name of the UIN of the individual you would like to select as an Additional Reviewer
8. Select the Review Type using the options provided. **This is a Required step when choosing Additional Reviewers.**

Get Additional Reviewers   Bill Employee

Employee Name

Thomas Allen (Training)

Select One

Others
Peers
Direct Reports

9. Click Submit
10. The Additional Reviewer(s) receive an inbox task to "Complete Additional Reviewer Evaluation"

UP Next

The Manager will complete the Employee's evaluation. The Manager can begin the evaluation immediately. They do not have to wait for **Additional Managers** and **Additional Reviewers** to submit but it is a ***best practice*** to do so.

Manager Completes Evaluation

11. Click the "Manager Evaluation: Staff Performance Review (Self Evaluation) action item in your inbox.
12. Click Go To:
    - Guided Editor: Use the simple step-by-step guide
    - Summary Editor: Edit all sections using the one-page view (continuous scrolling)
13. Managers have the option to add attachments. In addition, Managers will see any attachments added by the Employee during their self-evaluation.

Attachments

An attachment is not required. If you choose to attach a document to the Performance Review, please upload it here in the Attachment section.

Employee

Evaluation Supporting Document

`DOC` Supporting Documentation.docx

Updated By

Upload Date
(example: 6/1/2020)

Comment:

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14. Click **Add** if you would like to add any supporting documentation for the evaluation.

```
┌─────────────────┐
│  Manager        │
│    ╭───────╮    │
│    │  Add  │    │
│    ╰───────╯    │
└─────────────────┘
```

15. Click **Attach,** locate the file and upload

```
┌──────────────────────────────────────────┐
│                                            │
│   Evaluation Supporting Document           │
│   (empty)                                  │
│                                            │
│   File                                     │
│         ╭──────────────╮                   │
│         │    Attach     │  ⇐════════       │
│         ╰──────────────╯                   │
│                                            │
│   Update By                                │
│   (empty)                                  │
│                                            │
│   Upload Date                              │
│   (empty)                                  │
│                                            │
│   Comments:                                │
│                                            │
└──────────────────────────────────────────┘
```
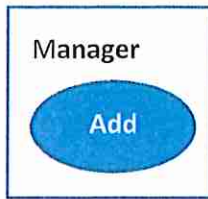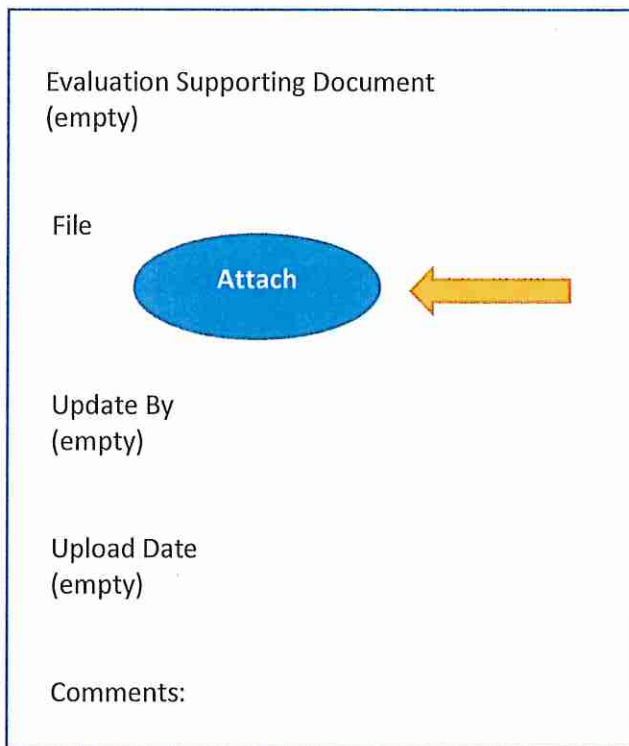
16. Enter comments for explanation of the document and what it supports
17. Click **Next** to move to the next section

Goals, Competencies, and Responsibilities

18. Review ratings and comments from the Employee, Additional Managers and Additional Reviewers (competencies only) as you go through each section
19. Provide a rating for each comment for each section as applicable; **Goals, Competencies, Supervisory** Competencies, and Responsibilities

Manager Evaluation	Employee Evaluation
Rating	Rating
Select one	Exceeds Expectations
Comment	Comment
Manager's Comments	**Employee's comments**
Additional Manager Name	
Additional Manager's comments	

Note: Comments are automatically displayed from **Additional Managers** and from Employee. Further drill down is necessary to see ratings and comments from **Additional Reviewers** (see below) on competencies

Details

Feedback

2

Click here to drill down and see comments

Certification Questions

19. Select the appropriate rating for the Employee

- Select **Yes** if the Employee is **past due** on required trainings
- Select **No** if the Employee is **not past due** on required trainings

Certification Question

Employee must not be past due on any assigned required training courses. If employee is past-due on one or more required training courses, manager and employee will discuss an action plan for the employee to complete the assigned courses in timely manner. **Is Employee past due on any assigned required employee training courses?**

```
┌─────────────────────────────────┐
│ Manager Evaluation (continued)  │
│                                 │
│ Rating                          │
│ ┌─────────────────────┐         │
│ │ Select one         │         │
│ ├─────────────────────┘         │
│                                 │
│ Select one                      │
│ Yes                             │
│ No                              │
│                                 │
└─────────────────────────────────┘
```

20. Click **Next** to move to the next section
21. Provide a rating and comments for the **Overall Rating** of the Employee

```
┌──────────────────────────────────────────────────────────┐
│  Manager Evaluation                                      │
│                                                          │
│   Rating                                                 │
│   ┌──────────────────────────────────┐                   │
│   │ Select one                       │                   │
│   └──────────────────────────────────┘                   │
│   ┌────────────────────────────────────────────────────┐ │
│   │ Enter comment:                                     │ │
│   │                                                    │ │
│   │                                                    │ │
│   └────────────────────────────────────────────────────┘ │
│                                                          │
│   Sofia Employee                                         │
│                                                          │
│   Comment                                                │
│                                                          │
└──────────────────────────────────────────────────────────┘
```

IMPORTANT: Comments are required if the Rating selection is **Does Not Meet Expectations** or **Partially Meets Expectations**. The performance review will then route to the Manager's Manager for approval.

22. Click **Next** to move to next section

Manager / Employee Review Meeting
You will be reminded that you should meet with your Employee to review the Position Restrictions and the Employee's evaluation

23. Answer the questions regarding the meeting
    - Selection Yes if you have already met with your Employee
    - Selection No if you have not met with your employee

```
┌─────────────────────────────────────────────────────┐
│  Manager/Employee Review Meeting                     │
│  ─────────────────────────────────────────────       │
│                                                       │
│  Have you had your Performance Review meeting with your │
│  Employee...                                          │
│                                                       │
│  Summary                                             │
│                                                       │
│  Manager Evaluation                                  │
│                                                       │
│  Rating *    ⬅━━━━━━━━   Select Yes or No            │
└─────────────────────────────────────────────────────┘
```

Note: You will be able to move forward with the process regardless of the answer on this question.

24. Click **Next** to move to the Summary Section

Summary

25. Review the evaluation information to be sure no more edits are needed
26. Click **Submit** only when you are ready to move the process forward, no more changes are needed and you have met with the Employee

You can click Save for Later if you have not met with the Employee or if you need to make changes

Note: If any changes are needed after submitting, search for the <u>My Team Performance Review</u> report and select <u>Send Back</u>. It will route back to you and you can make changes accordingly.

Up Next

A **best practice** would now be for the Employee to review the performance evaluation in Workday. The Employee and Manager may meet at this point or earlier, prior to submission by the Manager, to discuss the performance evaluation. This meeting is necessary because the Employee and Manager will be instructed to **document the date and time** when the meeting occurred in the comments section of their Acknowledgement of the evaluation.

The Employee will then submit the Acknowledgement of the performance evaluation

Employee Submits Acknowledgment

27. Click the "Manager Evaluation" action item in your inbox

28. You can review all information provided by you, your Manager, and any Additional Reviewers or Additional Managers that were added to the review. Your overall rating will be visible.

```
┌────────────────────────────────────────┐
│  Overall Rating                        │
│                                        │
│                                        │
│  Manager Evaluation                    │
│                                        │
│  Rating                                │
│  Exceeds Expectations      ⬅═══════    │
│                                        │
│  Comments                              │
│  Manager comment           ⬅═══════    │
│                                        │
│  Additional Manager                    │
│                                        │
│  Comments                              │
│   Additional manager comments          │
│                                        │
└────────────────────────────────────────┘
```

29. In the **Status** field, select an appropriate "Employees Only" option
    IMPORTANT: If you select that you do not agree with the evaluation, it will not stop the business process from moving forward.
30. Enter Comments as needed

```
┌──────────────────────────────────────────┐
│                                          │
│   🔵 EMPLOYEES ONLY. I acknowledge       │
│      I have reviewed the position        │
│      restrictions for accuracy. I have   │
│      reviewed and discussed this         │
│      performance evaluation with my      │
│      manager and I agree with the        │
│      evaluation.                         │
│                                          │
│   🔵 EMPLOYEES ONLY. I acknowledge       │
│      I have reviewed the position        │
│      restrictions for accuracy. I have   │
│      reviewed and discussed this         │
│      performance evaluation with my      │
│      manager and I do not agree with     │
│      the evaluation.                     │
│                                          │
└──────────────────────────────────────────┘
```

31. Click **Submit**

Manager Submits Acknowledgement

32. Click the "Manager Acknowledgement" action item in your inbox
33. In the Status field, select the appropriate "Manager Only" option

MANAGERS ONLY. I acknowledge I have reviewed the position restrictions for accuracy and a position restriction update is required. I have reviewed and discussed this performance evaluation with the employee.

MANAGERS ONLY. I acknowledge I have reviewed the position restrictions for accuracy and a position restriction update is not required. I have reviewed and discussed this performance evaluation with the employee.

Comment

Enter your comments here

34. Enter comments as needed.
35. Click **Submit**

Up Next

- If the **Manager** selects the option that includes "position description update required" please make changes to the Position Description and send to HR to complete
- If the Overall Rating is **Partially Meets Expectation** or **Does Not Meet Expectations**, the Manager receives a To Do: Complete Performance Improvement Plan

This completes the Managers Complete Performance Reviews