

Complete Performance Review (Staff with Self Evaluation)

Overview

This job aid outlines the activities for an Employee and a Manager to complete a Performance Evaluation that uses the Staff with Self Evaluation template.

Prerequisites:

- The Performance Review process must be initiated by the Talent Administrator using one of the templates including the Ad Hoc, Annual, Goal Setting or the Initial Performance Review templates
- The review period dates (the Period Start and End Dates) must be determined by the member's HR office. These dates are entered by the Talent Administrator
- Goal setting should occur several months prior to the performance evaluation time period

Important Information:

- After the performance template is launched the Employee receives an inbox task to complete the Self Evaluation

Self Evaluations can be required at the supervisors discretion. Supervisors should communicate to employees if there is an expectation that the self-evaluation be completed.

If completion of the self-evaluation is not required by the supervisor, the employee will need to select **Self Evaluation: Annual: Staff Performance Review** from their Workday inbox, then

 , then  to move the process forward.

The Manager also receives an inbox item to elect to add Additional Managers

The Additional Manager step is not used at TAMUG and should be skipped. Click on the gear icon  on the top left side of the screen to skip (see additional information below).

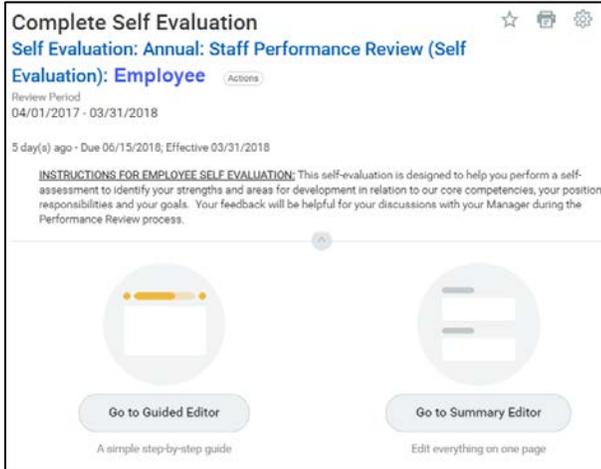
- After the Employee has completed the Self Evaluation, the Manager receives an inbox item to elect to add Additional Reviewers

The Additional Reviewers step is not used at TAMUG and should be skipped. Click on the gear icon  on the top left side of the screen to skip (see additional information below).

Steps

Employee Self Evaluation (if required)

1. Click the “Self-Evaluation” action item in your inbox.

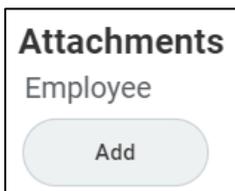


You can complete the self-evaluation in one of two ways:

- **Guided Editor:** Use a simple step-by-step guide
- **Summary Editor:** Edit all sections using a one page view

Note: This job aid will take you through the perspective of using the Guided Editor

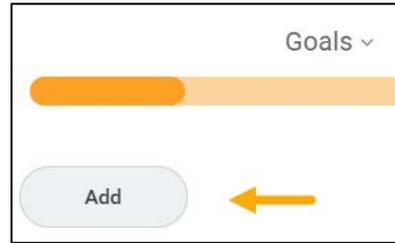
Employee’s have the option to add attachments relevant to the performance review at the beginning of the form as shown here



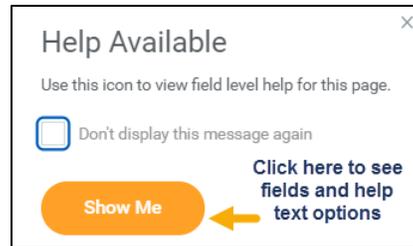
Rate Yourself on Goals

1. Click **Go to Guided Editor**

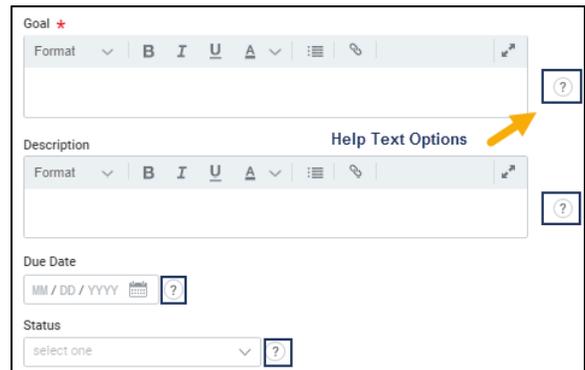
IMPORTANT: First Performance Review after Go Live may not contain prepopulated goals for all employees, so you may see a blank screen with an **Add** button



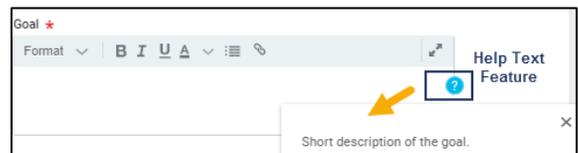
2. The following message also displays:



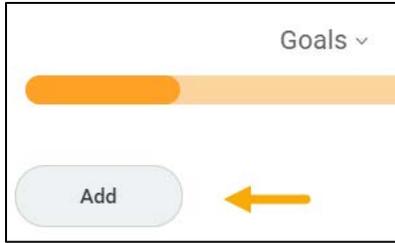
Note: If you select **Show Me**, fields will appear to review / enter goal information with question mark icons. Click the icon for further information about the field



Below is an example of what the help text looks like when you click on the icon



3. If you prefer not to have Help Text available, click the “X” and close out of the message
4. Begin your Self Evaluation by clicking **Add** if your Goals are not prepopulated



You will then see the following without the added Help Text icons:

Note that the fields are the same

- Review prepopulated goals **or** enter goals and relevant information including:
 - Goal.** Recommendation: Goals should be written in **measurable** form to help determine the extent to which they have been met (e.g. Employee will complete three professional development opportunities)
 - Description.** This field can include more detailed information on what the employee will do to meet the goal as well as what resources may be needed to meet the goal
 - Due Date.** This is the date by which the employee is expected to have met the goal
 - Status.** This is your current status on meeting this goal. Options

include: Discontinued, Not Started, In Progress and Complete

- Rating.** This is your evaluation of yourself on this goal. Options include: Does not meet Expectations, Partially Meets Expectations, Meets Expectations, and Significantly Exceeds Expectations
- Comments.** Enter comments for your manager to support your rating. This can help your manager have information of which they may not be aware.

Note: Prepopulated information should not be edited without prior discussion with your manager

- Click **Next** after completing the information described above for all goals

Rate Yourself on Competencies

- On the **Competencies** page, click the Edit icon and enter **Rating** and **Comments** for each competency (e.g., Service, Teamwork / Collaboration, Diversity & Respect, Initiative and Accountability)

- Click **Next**

Rate Yourself on Supervisory Competencies (if applicable)

9. Enter ratings for **Supervisory Competencies** (e.g., Supervision and Organizational Leadership), if needed

10. Click **Next**

Rate Yourself on Responsibilities

11. Enter ratings for **Responsibilities**

Note: Responsibilities should be prepopulated from the position restrictions. **If not, please contact your Manager for assistance**

12. Click **Next**

Answer the Certification Question

13. On the **Certification Question** page, answer the question, “Is Employee past due on any assigned required Employee training courses”? Select “Yes” or “No” in the **Rating** field

14. Click **Next** to see the summary of all the details entered

15. Review the information and click **Submit**

16. Click **Done**

IMPORTANT: The Manager will not be able to begin their evaluation until the Employee has submitted the Self Evaluation

Up Next

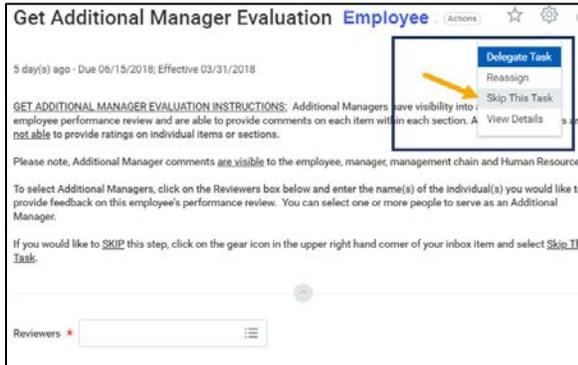
The Manager will complete the evaluation of the Employee

Manager Evaluates Employee

At the same time that the Employee has received the inbox task to complete their Self Evaluation, the Manager receives an inbox task to add **Additional Managers** to the evaluation process.

The Additional Manager step is not used at TAMUG and should be skipped.

Note: You may skip this step by clicking the gear icon and by selecting **Skip This Task**



Up Next

Once the Employee has submitted their Self-Evaluation, the Manager will be prompted to select **Additional Reviewers**

This task will not arrive in your inbox until the Employee has completed their Self Evaluation

The Additional Reviewers step is not used at TAMUG and should be skipped.

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

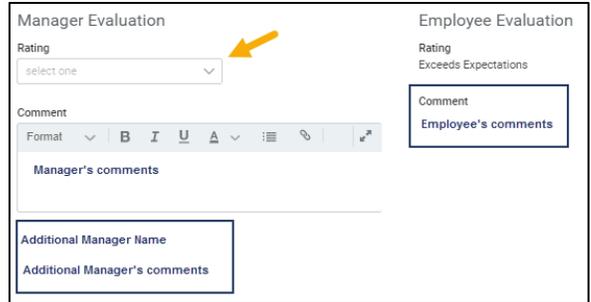


Up Next

The Manager will complete the Employee's evaluation.

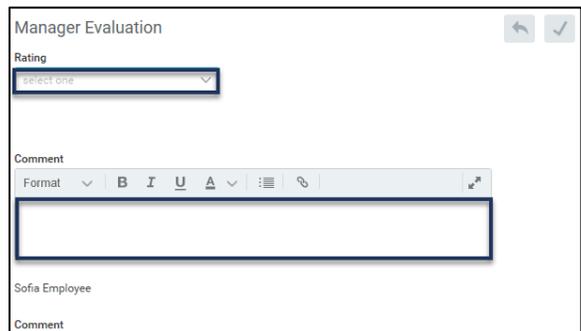
Manager Evaluation

1. Click the "Manager Evaluation: Staff Performance Review (Self Evaluation)" action item in your inbox
2. Review ratings and comments from the Employee
3. Provide a **Rating** and **Comment** for each goal, competency, responsibility and other details for the Employee, if needed



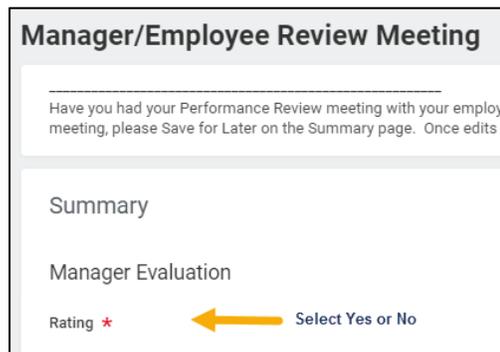
Note: Comments are automatically displayed from the Employee.

4. Select an **Overall Rating** and provide summary **Comments**



Note: The **Comment** is required if the **Rating** is a 1 or 2

5. Click **Next**. Review the summary of information to be sure no more edits are needed
6. Answer the question regarding your meeting with the Employee



7. If you select No, click **Save for Later**.
8. When you have completed your meeting with the Employee, select Yes and click **Submit**

IMPORTANT: After you submit you are unable to send back or correct. It is important that you review the contents of the performance review carefully prior to submitting

9. You will receive a confirmation message



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 **Acknowledgment** of the evaluation

The Employee will then submit the Acknowledgment of the performance evaluation

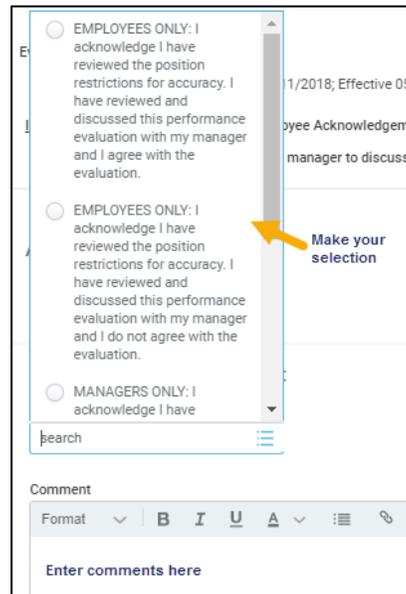
Employee Submits Acknowledgement

1. Click the “Manager Evaluation” action item in your inbox
2. You can review all information provided by you and your Manager. Your overall rating will be visible



3. In the **Status** field, select an appropriate “Employees Only” option

4. Enter **Comments** as needed



Up Next

The Employee’s Manager receives an inbox task to acknowledge the evaluation and add an evaluation status with comments

Manager Submits Acknowledgement

1. Click the “Manager Acknowledgement” action item in your inbox
2. In the **Status** field, select an appropriate “Manager Only” option
3. Enter comments as needed

and I do not agree with the evaluation.

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.

1/2018; Effective
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employee to disc

Make your selection

Search

Comment

Format | B | I | U | A | : | ☰

Enter your comments here

Up Next

- If the Manager selects the option that includes “**position description update required**,” the Manager receives a To-Do to **Edit Position Restrictions**
- If the Overall Rating is Partially Meets Expectations or Does Not Meet Expectations, the Manager receives a To Do to **Complete a Performance Improvement Plan**

This completes the **Complete Performance Evaluation for Staff with Self Evaluation** template