



Performance Evaluation (Manager)

When one of your direct reports completes their performance review, it will route to your Workday Inbox to complete your manager review.

While you will be able to see your employee's comments and ratings on their performance review, you will not be able to edit them. Once you complete the performance review in Workday, you are expected to schedule time with your employee to discuss the review in person.

Select the task titled **Manager Evaluation: HMC Performance Evaluation for Staff**. To complete one step a time, select **Go to Guided Editor** on the left. To complete all of the performance review steps on one page, select **Go to Summary Editor** on the right.



Tip: You can stop the performance evaluation at any time and Workday will allow you to continue where you left off.

STEPS

1. The first step of the manager performance evaluation is to review the answers to the employee's self-evaluation questions. The questions are an important part of the review process. It is a means for your employee to think about what they do and have done, and it helps you understand how they view their job responsibilities. Click on the **Edit** icon to provide responses to each of the questions and **Next** when you are finished.

2.

Question HMC Performance Evaluation	
If you performed any new responsibilities or additional duties that are outside the scope of what you do regularly, what were they?	
Manager Evaluation	Employee Evaluation
Answer I agree and appreciate your willingness to take on additional duties.	Answer I assumed responsibility for processing leaves of absences for staff and faculty.

3. The next step of the performance review is the manager assessment of various performance factors. You will see your employee's response to each performance factor on the right. Click on the **Edit** icon to rate your employee on each competency and provide additional text to support your rating. If you are in Guided Editor mode, click **Next** to move to the next step. If you are in Summary Editor mode, scroll down.

4.

The screenshot shows a performance review form with two main columns: Manager Evaluation and Employee Evaluation. On the left, there are labels for Competency (Attendance), Category (Behavior), and Description (Meets acceptable attendance practices.). The Manager Evaluation section includes a Manager Rating of '4 - Exceeds Expectations', a description of strong performance, and a comment about Kimberly's attendance. The Employee Evaluation section includes an Employee Rating of '4 - Exceeds Expectations', a description of strong performance, and a comment about the employee's reliability and time off requests. A red box highlights the Manager Evaluation section.

Tip: The definitions for each rating scale are at the top of the page. You can expand the text box by clicking on the two arrows.

5. The next step of the performance review is the goals section. Review the status of each goal from the previous performance review period, and click on the **Edit** button to rate your employee on each goal and provide additional text to support your rating. Workday will calculate the overall rating however the goals section will allow a manager to override the goals overall rating by clicking **I want to change the rating box**. If you are in Guided Editor mode, click **Next** to move to the next step. If you are in Summary Editor mode, scroll down.

The screenshot shows the Summary page of the performance review. It has two columns: Manager Evaluation and Employee Evaluation. In the Manager Evaluation column, the Rating is set to '5 - Exceptional Performance' (highlighted with a red box and a green arrow). Below it, the 'I want to change the Rating:' checkbox is checked (highlighted with a red box). The Calculated Rating is '4' (highlighted with a green box and a green arrow). A text box explains that the calculated rating is 4 but managers can override it. In the Employee Evaluation column, the Rating is '4 - Exceeds Expectations', and the Calculated Rating is also '4'.

6. The next step of the performance review is the overall performance rating section. Click on the **Edit** button to provide additional text to support your rating. If you are in Guided Editor mode, click **Next** to move to the next step. If you are in Summary Editor mode, scroll down.

The screenshot shows the 'Overall Performance Rating' section. At the top, there is a progress bar with two steps, the second of which is active. Below the progress bar, the section is divided into two columns: 'Manager Evaluation' and 'Employee Evaluation'. Each column contains a 'Rating' (4 - Exceeds Expectations for Manager, 3 - Meets Expectations for Employee), a description of the rating, and a 'Calculated Rating' (3.65 for both). Below the ratings, there are 'Comment' sections. The Manager's comment section is highlighted with a red box and contains a rich text editor with a toolbar and the placeholder text 'Manager: Provide additional text regarding your overall performance rating here.' The Employee's comment section contains the placeholder text 'Optional: Provide additional text regarding your overall rating here.'

7. The next step will allow managers to view supporting documents uploaded documents by your employee related to their performance review and add comments. Managers can also add supporting documents and a comments. If you are in Guided Editor mode, click Next to move to the next step. If you are in Summary Editor mode, scroll down.

The screenshot shows the 'Supporting Documents' section. At the top, there is a progress bar with two steps, the second of which is active. Below the progress bar, there is a message: 'If there are any supporting documents to the performance evaluation that you would like to include as part of the performance review, please attach them here.' The section is divided into two main parts: 'Employee' and 'Summary'. The 'Employee' part shows a list of supporting documents. One document, 'Evaluation Supporting Document', is highlighted with a red box and shows a file icon and the name 'Test.docx'. Below the list, there are fields for 'Updated By' (Kimberly Taylor (101917)) and 'Upload Date' (02/22/2018 05:00 PM). Below these fields, there is a 'Comment' section highlighted with a red box, containing the text 'Letter of appreciation from colleague.' Below the comment section is an 'Add' button. The 'Summary' part shows the 'Employee Evaluation' section, which has a 'Comment' field highlighted with a red box, containing the placeholder text 'Optional: Provide closing comments here.'

8. Once you have completed the performance review, you will see a page that displays all of your previous responses. You can click on the **Edit** icon on any section to change your responses. When you are satisfied with your responses, click **Submit**.
 - a. If you are a manager, the performance review will route to your vice president for review and approval. Once approved, you will receive a **To Do** step in your Workday Inbox asking you to confirm that you have met with your employee in person. Schedule a meeting with your employee and enter the date you met in the comments box. Do not complete this step until after you've met with your employee. The performance review will then route back to the employee to acknowledge their review.
 - b. If you are a Vice President there are no additional approvals required however if you add comments it will result in additional workflow steps.

Complete To Do

Confirm that you have met with your direct report to review his/her performance review

Actions

52 second(s) ago - Effective 06/30/2018

For

Kimberly Taylor (101917)

Overall Process

HMC Performance Evaluation Form for Staff: Kimberly Taylor (101917)

Overall Status

In Progress

Instructions

By submitting this step, you confirm that you have met with your direct report and discussed his/her employee performance review. The next step will be for the employee to acknowledge the performance review. Then, you will acknowledge the performance review to complete the performance evaluation.

I met with Kimberly on <date> to discuss her annual performance evaluation.

9. Once your employee acknowledges their performance evaluation, it will route back to you to acknowledge. Your employee's performance evaluation form is now complete. You can view or print your employee's performance in the Career section of the employee's profile under the Performance Reviews heading.

Acknowledgment

Manager Feedback

Manager Acknowledgment

Status

★

Acknowledge Review

Comment

Keep up the great work.

Employee Acknowledgment

Status

Acknowledge Review

Comment

Thank you for your support over the past year and I look forward to another successful year.

Entered by

Kimberly Taylor (101917)

Date

02/22/2018 07:34 PM