
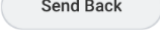


Annual Performance Evaluation – Manager & 2nd Level Manager


The first step of the annual evaluation process is for the employee to complete a Self-Evaluation. The Manager and 2nd Level Manager will then complete the Manager Evaluation and see a side-by-side of the self-evaluation.

1. Log in to **Workday**
2. Click on your Inbox 
3. Select the inbox item for **Manager Evaluation: 2020/2021 Annual Performance Evaluation**
4. Review and complete each section.


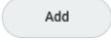


If you require more information from the employee, you may click on the section header and from the drop-down menu, click on Summary. At the bottom, you have the

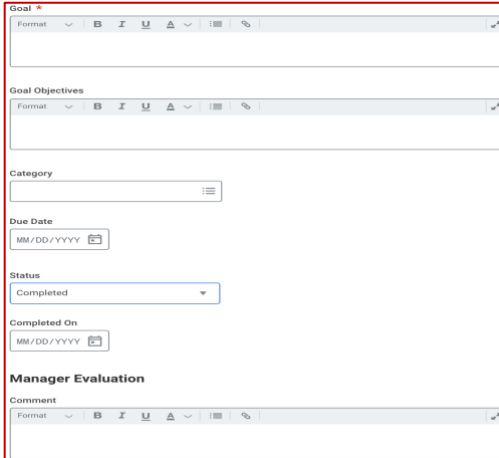
option to **Send Back** . Be sure to notify the employee if you do send back as the Inbox will not show the reason.

Note for 2nd Level Manager Approval:

1. Follow same instructions to review the employee self-evaluation and manager evaluation.
2. You may make comments in the Manager comment boxes. Please include your name with any comments you make. Follow same instructions to review the employee self-evaluation and manager evaluation.
3. Once complete, click on the Approve  button to send to the employees' supervisor to meet with the employee.

Section: Results Achieved – These are the goals for this review period (4/1/2020 – 3/31/2021).



1. Review each goal and ensure that all sections are complete. If the goal is completed, make sure it has a completion date.
2. To comment on a goal, click on the goals' edit  button. Enter comments regarding this goal in the Manager Evaluation Comment Box.
3. To add a goal, scroll to the bottom and click on  and complete the form by entering the Goal, Category, Due Date (if unknown, select 03/31/2021), and the Status. If Status is complete, enter Completion Date.
4. When all goals have been updated, click 
NOTE: if you click Add and no longer need to add another goal, click on the  button

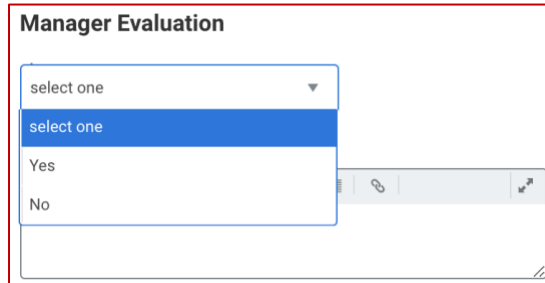


The screenshot shows a 'Goal' form in Workday. It has a 'Format' toolbar at the top. Below that is a 'Goal Objectives' section with another 'Format' toolbar. The form includes fields for 'Category', 'Due Date' (with a calendar icon), 'Status' (a dropdown menu set to 'Completed'), and 'Completed On' (with a calendar icon). At the bottom is a 'Manager Evaluation' section with a 'Comment' field and a 'Format' toolbar.

Annual Performance Evaluation – Manager & 2nd Level Manager

Section: Position Description

1. Click on the edit  button.
2. From the drop-down screen respond to the question, “Does your position description accurate reflect your major responsibilities?” and provide comments.
3. Click  to continue to next section.



Manager Evaluation



select one

select one

Yes

No

Section: Performance Indicators

1. For each Competency, Click on the edit  button and select a rating from the drop-down menu using the rating guide at the top.
2. Click in the Comment box to provide comments.
3. Once ALL competencies (6 for staff and 9 for managers) have been completed, click Next 



Manager Evaluation

Manager Rating

select one

select one



EE – Exceeds Expectations

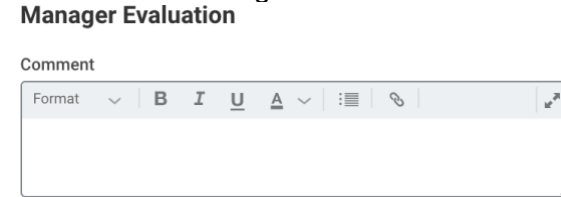
CM – Consistently Meets Expectations

SM – Sometimes Meets Expectations

NM - Not Meeting Expectations

Section: Main Accomplishments

1. Review the professional accomplishments entered by employee during the current review period
2. Click on the edit  button and provide comments.
3. Click Next  to go to next section.



Manager Evaluation



Comment

Format



B I U A

Section: Goals for Next Review Period

A minimum of 3 goals is required for the next rating period (April 2021 – March 2022). **Recommended Goal:** Participate in at least one personal or professional development program to foster an enriched understanding of diversity, equity, and inclusion and its application to your department.

1. Review goals entered by employee.
2. To edit any information, click on the  button.
3. To add an additional goal, Click on the Add  button.
4. Enter Goals. All Goals must have a Goal, a Status (e.g. Not Started), a Category, and Due Date (if unsure, enter 03/31/2022).

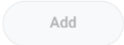

Annual Performance Evaluation – Manager & 2nd Level Manager


5. Click on the Add  button to add additional goals.
6. Click Next  to go to next section.

Section: Supporting Documents


- if none, click Next 

1. To review employee submitted document, click on the document

2. To upload a supporting document, click on the the  button.
3. Click on the Attach  button to select the file.


4. Repeat for additional attachments.
5. Click Next  to go to next section.


Section: Overall

1. Click on the  button.
2. Enter the overall rating for the employee for the 2020-21 performance evaluation period.
3. Provide any additional comments or summarize employee performance during this review period in the **Overall Commentary** box.

Annual Performance Evaluation – Manager & 2nd Level Manager


Section: Summary Review

1. Prior to Submitting the evaluation for 2nd level manager review, you have an opportunity to review and edit. To edit any information, click on the  button.

2. Once complete, click on the Submit  button to send to your manager for review and approval.

3. You may receive an Error box when submitting. Please click on View All and fix any errors.



4. Once complete, click on the Submit  button.

Next Steps:

- The evaluation will be sent to your manager for review and approval.
- You will receive a Workday inbox item to print the PDF document and set up a meeting with the employee to discuss their performance evaluation.

Overall Status: In Progress


Instructions: **HOLD: Meet with the Employee**

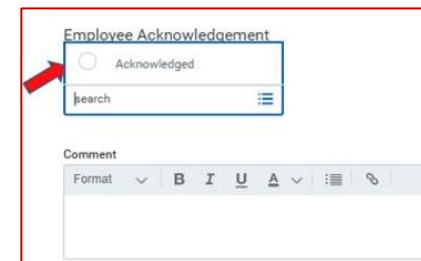
1. Please set up a meeting with the employee to review the contents of this performance evaluation **BEFORE** clicking submit. Clicking the submit button will release the evaluation to the employee.
2. Attached is a PDF of the completed review. Print this off before meeting with the employee.
3. After meeting with the employee, you must click the **SUBMIT** button below to release the evaluation to the employee for acknowledgment. You will receive another inbox item in Workday for your final acknowledgment, completing this process.

Please contact your Senior HR Partner or the Employee Development Manager with any questions.

1 Item

File Name	Type	File	Created by	Date and Time Created	
Employee Review Printout 2021-02-11 12:28 PST	Report (PDF)	CL	Anna Han	02/11/2021 12:28 PM	Delete

- After meeting with the employee, go back to the Workday Inbox item and click Submit  to release the evaluation to the employee.
- The employee will receive a Workday Inbox item to acknowledge that they have received their performance evaluation and provide comments.
- You will receive another Workday inbox item to review any employee comments. Click on Manager Acknowledgment and select the Status of **Acknowledged** and add any comments.



Once complete, click on the Submit  button. This will complete the process.