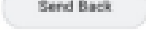# **Performance:** Annual Performance – Manager Self-Evaluation/Approval **Manager**

The first step in the annual performance evaluation process is for the employee to complete a self-evaluation. The employee's immediate supervisor and 2nd Level Manager will then complete the manager evaluation and see a side-by-side of the self-evaluation.

1. Go to your Workday inbox and select the **Manager Evaluation: 2023/2024 Annual Performance Evaluation**

2. Click **Get Started** [Get Started] and review and complete each section of the evaluation.

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** [Send Back] . (Be sure to notify the employee if you do send back the evaluation as the Inbox will not show the reason.)

Note for 2nd Level Manager Approval:

鑻 Follow the same instructions to review the employee self evaluation and manager evaluation.
鑻 You may make comments in the Manager comment boxes. (Please include your name with any comments you make.) 鑻

Once complete, click on **Approve** [Approve] to send the evaluation back to the employees' supervisor so they can meet with the employee

Section: Results Achieved

These are the goals for this review period (4/1/2023 - 3/31/2024).

NOTE: All Goals must have the following: Goal, Category, Status and Due Date. For any goals with status "Complete", they must have a completion date.

3. Review each goal and ensure that all sections are complete.

4. To add a goal, scroll to the bottom and click on the **Add** [Add] button.

5. When all goals have been updated, click **Next** [Next] .

Section: Position Description

6. Using the drop-down, respond to the question, "Does your position description accurately reflect your major responsibilities?" and provide comments in the comment box below.

7. Click the **Next** [Next] button to continue to the next section.

Performance: Annual Performance – Manager Self-Evaluation **Manager**
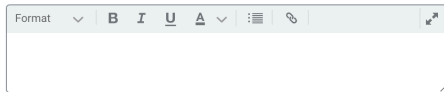
Section: Performance Indicators

8. For each Competency listed, select a rating from the drop-down menu. You can use the comment box to provide comments.

9. Once ALL Competencies have been rated (6 for staff and 8 for managers), click **Next** [Next] to continue to the next section.

Section: Main Accomplishments

10. Review the professional accomplishments and areas of struggle entered by the employee.

11. List additional accomplishments and areas of struggle during the current review period.

Employee

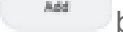Comment [Format ▼ | **B** *I* U A ▼ | :≡ ⬚ | ↗]

12. Click **Next** [Next] to continue to the next section.

Section: Goals for the Next Review

Period

A minimum of 3 goals is required for the next rating period (April 2024 - March 2025).

13. Review goals entered by the employee.

14. Edit information and make comments as necessary

15. Click the **Add** [Add] button to add a new goal. All Goals must have the following: Goal, Goal Objective, Category, Status and Due Date.

16. Once you have reviewed all the goals, click **Next** [Next].

Section: Supporting Documents

Note: If there are none, just click the Next button to continue to the next section.

17. Review any employee submitted documents.

18. If you would like to upload any supporting documents, Click **Select Files** [Select files] or drag and drop them.

19. Then, you are going to click the **Upload** [Upload] button to upload the file.

20. Repeat the first two steps to attach any additional documents.

21. When you have finished, click **Next** [Next].

workday. | EDUCATION

Performance: Annual Performance – Manager Self-Evaluation Manager

Section: Overall

22. Enter the overall rating for the employee for the 2023-2024 performance evaluation period.

23. Provide any additional comments or summarize employee performance which justifies the overall rating in the **Overall Commentary** box.

24. click **Next** to continue.

Summary Review

25. Prior to submission to the 2nd level manager, you can review and edit any information in the evaluation.

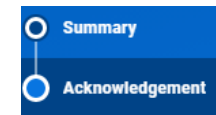26. Once you are done reviewing, go ahead and click on **Submit**

Next Steps: Meet with Employee and Acknowledgements

- When you click **Submit**, the evaluation will be sent to the 2nd level 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. Note: overall rating will not be included in the evaluation until it is released to the employee.

| File Name	Type
Employee Review Printout 2023-03-09 11_37 PST.pdf	Business Form (PDF)

1 item

- After the meeting with the employee, go back to the Workday Inbox item and click **Submit** to release the evaluation to the employee.

- You will receive a Workday inbox item to review any employee comments. Click on **Acknowledgement** in the left panel:

  - Summary
  - Acknowledgement

Then, select the status of "Acknowledged" and add any comments

Manager

Status * | Search
          Acknowledged

Comment

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