Workday Performance Evaluation Checklist
(Benefit Eligible Employees)

April 1, 2024 - March 31, 2025

Getting Ready for Performance Evaluations - below are the requirements for each section

1. **Results Achieved**
   - ▢ Review your previous goals
   - ▢ Update all necessary areas for each goal and include comments
   - ▢ All goals must have the following **(required)**
     - ☐ Goal
     - ☐ Due Date
     - ☐ Category (performance or development goal)
     - ☐ Status (e.g. Not Started, In Progress)
     - ☐ Completion Date (if applicable)
2. **Position Description**
   - ▢ The rating (yes/no) is **a required field**
   - ▢ Summarize any changes for further discussion with manager, if applicable.
3. **Performance Indicators**
   - ▢ Select rating for each competency area **(Required)**
   - ▢ Enter any comments to support rating
4. **Main Accomplishments & Challenges**
   - ▢ Enter main accomplishments for review period
   - ▢ Include any challenges experienced during the year
5. **Update Goals for Next Review Period**

   All goals **must have** the following: **(Required)**
   - ❑ Goal
   - ❑ Due Date
   - ❑ Category (performance or development goal)
   - ❑ Status (e.g. Not Started, In Progress)
   - ❑ A minimum of 3 goals for next review period
6. **Supporting Document(s)**
   - ▢ **Optional** - Upload Feedback surveys 360, skip level, letters, email
7. **Manager Overall Rating (Manager only)**
   - ▢ Enter Overall Rating for performance period (**Required)**
   - ▢ Enter Overall Commentary supporting overall rating

Questions? We are here to help! employeedevelopment@scu.edu

Steps of Evaluation Process - Please check in with your manager if they have a different timeline. As one step is completed, the evaluation moves forward to the next step. The dates listed below are the deadlines for each step before auto-forwarding to the next step.

Step	Action	Complete no later than…
Employee Submits	Self- evaluation will go to your Manager	March 21, 2025 5:00 pm
Manager Submits	Manager completes Employee Evaluation and submits to 2nd level manager	April 4, 2025 5:00 pm
2nd Level Manager Approves	2nd Level Manager reviews and approves	April 25, 2025 5:00 pm
Performance Meeting	Manager prints out the Evaluation and meets with Employee	May 9, 2025 5:00 pm
Release to Employee	Supervisor clicks "submit" in Workday to release the Evaluation to the Employee	May 9, 2025 5:00 pm
Employee Acknowledgement	Employee reviews, comments, and acknowledges receipt of the evaluation	May 14, 2025
Manager Acknowledgement	Manager reviews Employee comments and clicks on "acknowledge" to complete the process	May 16, 2025

Helpful Information/Documentation

Logging into Workday	Make sure you are **using VPN** to view your Evaluation in your Inbox
Save for Later	You may save your progress at any point and come back to submit your evaluation at a later time by selecting the "Save for Later" button. The item will remain in your Inbox.
Employee User Guide	Step by step Employee User Guide
Manager User Guide	Step by step Manager User Guide

Performance Rating Descriptors	Expanded descriptors for each rating (EE, CM, SM, NM)
Add Button Add	Use the Add button to add new goals for the next review period. It shows up a bit ***faint*** but just click on it.
Send Back Button Send Back	Sends evaluation back to manager or employee if edits needed.