


# Annual Performance Evaluation – Employee Self-Evaluation

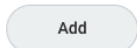
The first step of the annual evaluation process is for the employee to complete a Self-Evaluation.

1. Log into **Workday**
2. Click on your Inbox 
3. Select the inbox item for **Self Evaluation: 2020/2021 Annual Performance Evaluation**
4. Complete each section of the evaluation


**Section: Results Achieved** – These are your goals for this review period (4/1/2020 – 3/31/2021). Please ensure that all sections are complete. If you mark the goal completed, please make sure it has a completion date.



1. If you entered goals during the last performance period, your active goals will auto upload. If there are any missing goals, scroll to the bottom and click on “Add Existing Goal” and select the goals you wish to upload.

2. If no goals were previously entered, click on

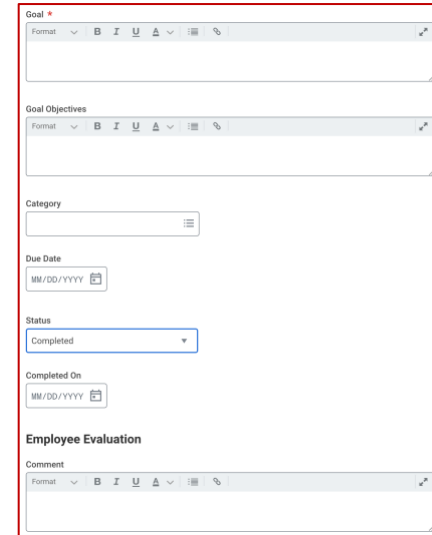


to add a goal, and complete the form by entering the Goal, Category, Due Date (if unknown, select 03/31/2021), and the Status. If Status is complete, enter Completion Date.



3. To update a goal, click on  to edit a goal, enter comments regarding this goal in the Comment Box. NOTE: For any goal with status “Complete,” you must enter the completion date.

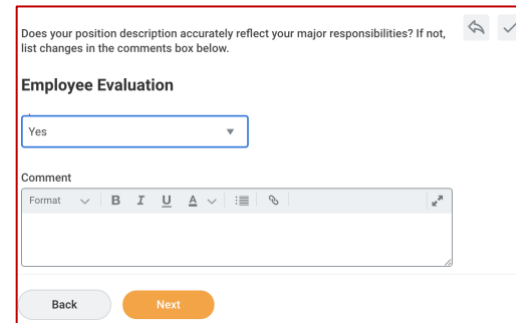
4. When all goals have been updated, click 
5. NOTE: if you click Add and no longer need to add another goal, click on the  button

You may also click  to delete a goal.





## Section: Position Description

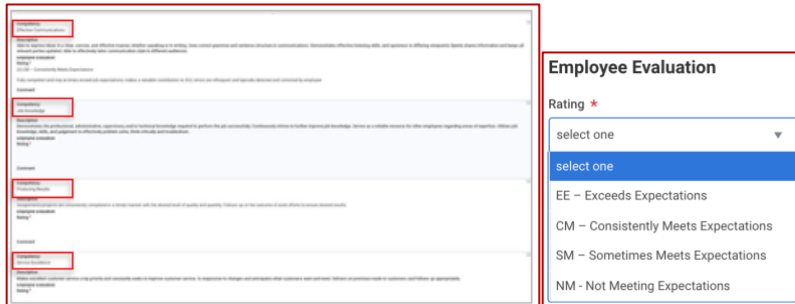
1. Click on the edit  button.
2. From the drop-down screen respond to the question, “Does your position description accurately reflect your major responsibilities?” and provide comments.
3. Click  to continue to next section.



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## Section: Performance Indicators

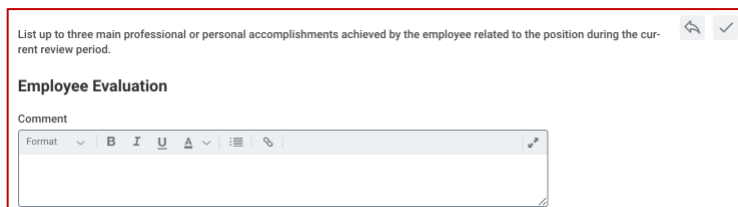
1. For each Competency, click on the edit  button and select a rating from the drop-down menu using the rating guide at the top.
2. Click in the Comment box to provide comments.
3. Once ALL competencies (6 for staff and 9 for managers) have been completed, click Next 



The screenshot shows a list of competencies on the left, each with an edit icon. On the right, the 'Employee Evaluation' dropdown menu is open, showing a 'Rating' section with a star icon and a 'select one' dropdown. The dropdown options are: EE - Exceeds Expectations, CM - Consistently Meets Expectations, SM - Sometimes Meets Expectations, and NM - Not Meeting Expectations.

## Section: Main Accomplishments

1. Click on the edit  button.
2. List professional accomplishments achieved during the current review period.
3. Click Next  to go to next section.

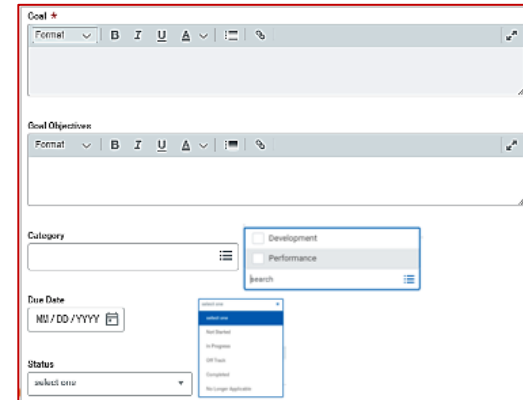


The screenshot shows a text box with the instruction: 'List up to three main professional or personal accomplishments achieved by the employee related to the position during the current review period.' Below this is the 'Employee Evaluation' section, which includes a 'Comment' label and a rich text editor with a toolbar containing options for Bold, Italic, Underline, and other text formatting.

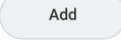

## Section: Goals for Next Review Period

You will set a minimum of 3 goals 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. Click on the Add  button.



The screenshot shows a form for adding a goal. It includes a 'Goal' field with a rich text editor, a 'Goal Objectives' field with a rich text editor, a 'Category' dropdown menu with options for 'Development' and 'Performance', a 'Due Date' field with a date picker, and a 'Status' dropdown menu with options for 'Not Started', 'In Progress', 'On Track', 'Completed', and 'Manager Review'.

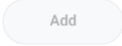


2. Enter Goals. All Goals must have a Goal, a Status (e.g. Not Started), a Category, and Due Date (if unsure, enter 03/31/2022).
3. Click on the Add  button to add additional goals.
4. Click Next  to go to next section.

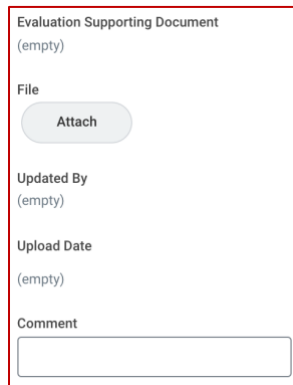
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## Section: Supporting Documents


- if none, click Next




1. To upload supporting document, click on the the Add  button.
2. Click on the Attach  button to select the file.
3. Repeat for additional attachments.
4. Click Next  to go to next section.




## Summary Review


1. Prior to Submitting your self-evaluation, 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 supervisor for completion.
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:

- Your self-evaluation will be sent to your immediate supervisor and their manager for completion
- Your manager will be setting up a meeting to discuss your performance evaluation
- After meeting, you will receive a Workday inbox item to acknowledge that you have received your performance evaluation.
- **Click on Employee Acknowledgment and select the Status **Acknowledged**, add any comments, and click on the Submit  button to send to your supervisor for completion.**

