

April 1, 2020 - March 31, 2021



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 (*select pencil icon to edit*)
- Required fields** - Goal, Category, Due Date, Status, 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. (*select pencil icon to edit*)

3. Performance Indicators

- Select rating for each competency area (**Required**)
- Enter any comments (**Optional**)

4. Main Accomplishments

- Enter main accomplishments for review period
- Include any struggles experienced during the year

5. Update Goals for Next Review Period

All goals **must have** the following: (Required)

- Description of the Goal
- Category (performance or development goal)
- Due Date
- 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

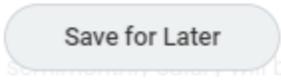
7. Manager Overall Rating (**Manager evaluation only**)

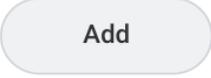
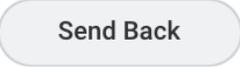
- Enter Overall Rating for performance period (**Required**)
- Enter Overall Commentary (**Optional**)

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 when **HR** will *automatically* advance evaluations to the next step (*no matter if you have completed/uncompleted the section*).

Step	Action	Complete <u>no later than...</u>
Employee Submits	Self- evaluation will go to your Manager	March 26, 2021
Manager Submits	Manager completes Employee Evaluation and submits to 2nd level manager	April 9, 2021
2nd Level Manager Approves	2nd Level Manager reviews and approves	April 16, 2021
Performance Meeting	Manager prints out the Evaluation and meets with Employee	April 23, 2021
Release to Employee	Supervisor clicks “submit” in Workday to release the Evaluation to the Employee	April 23, 2021
Employee Acknowledgement	Employee reviews, comments, and acknowledges receipt of the evaluation	April 28, 2021
Manager Acknowledgement	Manager reviews Employee comments and clicks on “acknowledge” to complete the process	April 30, 2021

Helpful Information/Documentation

Logging into Workday	Make sure you are using VPN to view your Evaluation in your Inbox
	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 	Use the Add button to add new goals for the next review period. It shows up a bit <i>faint</i> but just click on it.
Pencil Icon 	Use the pencil icon to edit/add items to the Performance Evaluation Form.
Delete Icon 	Deletes a goal.
Undo Icon 	Undoes the last action taken.
Save 	Saves a section within the performance evaluation.
Send Back Button 	Sends evaluation back to manager or employee if edits needed.