

Job Aid: Colleague Complete Self-Evaluation

Performance Management



Overview

Annual Performance Review Process and Timing




Use this job aid to complete your self-evaluation as part of the annual performance review process. The self-evaluation is completed prior to the annual review.

Colleague Complete Self-Evaluation

1. Log into Workday.
2. Click **Inbox** to access all items.
3. Look for the **Complete Annual Self-Evaluation**: inbox item.
4. Click the **Complete Annual Self-Evaluation**: inbox item.

Workday Inbox

Welcome, On behalf of: Marshall, Susan (3191198)

**Inbox**
18 items

Complete Annual Self Evaluation: Marshall, Susan (3191198)
37 seconds ago – Effective 06/30/2021

Manager Screening: Maloni, Michael, Cindy Aster (Internal) – 99142780 Patient Registration
18 hour(s) ago

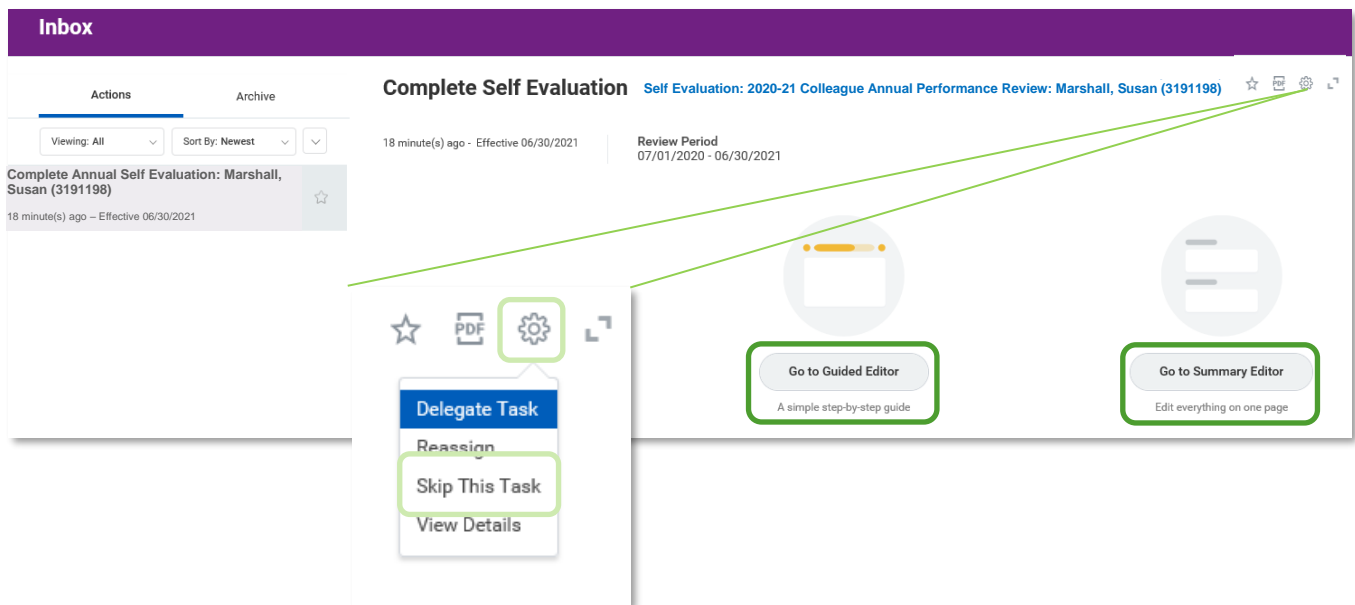
Manager Screening: Schuester, Melanie – 99134301 CAN – Dyersville Senior Care – Full Time Days
1 day(s) ago

Colleague Complete Self-Evaluation (continued)

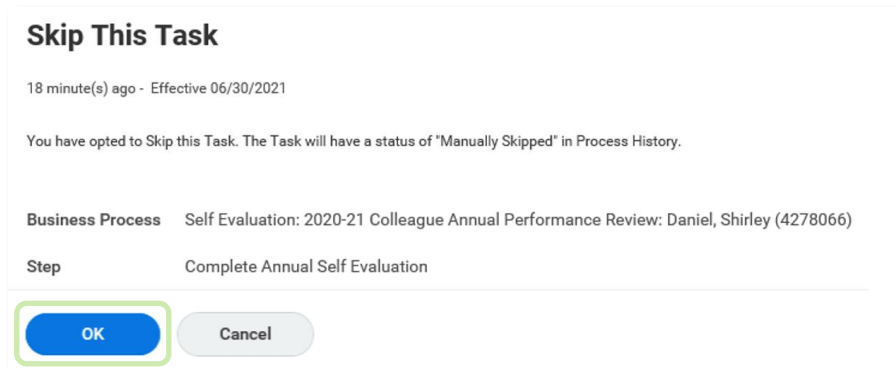
5. Click **Go to Guided Editor** to complete the eval using the step-by-step guide.
OR
Click **Go to Summary Editor** to complete the eval all on one page.

Note: To “Skip This Task” for the Self Evaluation, click the **Settings (wheel icon)** symbol. Best Practice is for colleagues to complete their self-review. Select **Skip This Task** only if your Manager has given you instructions to do so. Review the information in the **Skip This Task** dialogue box and click **OK** to continue (which advances the review to the Manager Evaluation).

Complete Self Evaluation Window



Skip This Task Option Dialogue Box



Colleague Complete Self-Evaluation (continued)

6. Review the **Core Values** Statement.
7. Click the **Rating** drop-down arrow and select the **Rating** that indicates how you've met the **Core Values**.
8. (Optional) Type a **Comment** to describe the actions taken to qualify the **Rating**.
9. Click the **Checkmark** to save the Rating and Comment, if entered.

Colleague Complete Self-Evaluation (continued)

Core Values Window

Colleagues: Comment and rate yourself on your performance demonstrating the Core Values during the performance year.

Managers: Comment and rate the colleague on his/her performance demonstrating the Core Values during the performance year.

Core Values

Statement

Colleague demonstrates the Core Values of Trinity Health on a daily basis through his/her behavior and interaction with others, internally and externally, to achieve the goals and priorities of the organization. The Trinity Health Core Values are: Reverence, Commitment to Those Who Are Poor, Safety, Justice, Stewardship, Integrity.

Employee Evaluation

Rating *

select one

Comment

Format [B] [I] [U] [A] [List] [Link] [Image]

Employee Evaluation

Rating *

select one

Exceeded

Fully Met

Partially Met

Did Not Meet

10. Review the information.
11. (Optional) Modify the individual Rating or Comment.
12. (Optional) Modify the Summary Rating or Comment.
13. Click **Next** to advance to the next section.

Core Values Window (Populated)

Core Values

Statement

Colleague demonstrates the Core Values of Trinity Health on a daily basis through his/her behavior and interaction with others, internally and externally, to achieve the goals and priorities of the organization. The Trinity Health Core Values are: Reverence, Commitment to Those Who Are Poor, Safety, Justice, Stewardship, Integrity.

Employee Evaluation

Rating *

Fully Met

Communication, behavior and actions are typically aligned with Trinity Health's Core Values.

Comment

Each day my communication, behavior and actions positively exemplify the Core Values when interacting with internal and external customers.

Summary

Section Weight

30

Employee Evaluation

Rating

Fully Met

Communication, behavior and actions are typically aligned with Trinity Health's Core Values.

Comment

Next

Note: The section weights automatically add up to 100%.

14. Click the **Rating** drop-down arrow and select the **Rating** that indicates how you've met the **Role Specific Job Duties**.
15. (Optional) Type a **Comment** to describe the actions taken to qualify the **Rating**. Best Practice is for colleagues to provide a comment.
16. Click the **Checkmark** to save the Rating and Comment, if entered.

Colleague Complete Self-Evaluation (continued)

Role Specific Job Duties Window

Colleague: Please comment and rate your performance of job duties during the performance year.

Manager: Please comment and rate your colleague on how well they performed their job during the performance year. Comments should include specific examples of areas the colleague is performing well and opportunities for development.

Role Specific Job Duties

Statement
Colleague demonstrates the essential functions, knowledge and skills in the job description, including other duties and competencies as assigned.

Employee Evaluation

Rating *
select one

Comment

Rating *

- select one
- Exceeded
- Fully Met
- Partially Met
- Did Not Meet

Next

17. Review the information.
18. (Optional) Click **Edit** (pencil) to modify the individual Rating or Comment.
19. (Optional) Click **Edit** (pencil) to modify the Summary Rating or Comment.
20. Click **Next** to advance to the next section.

Role Specific Job Duties Window (Populated)

Role Specific Job Duties

Statement
Colleague demonstrates the essential functions, knowledge and skills in the job description, including other duties and competencies as assigned.

Employee Evaluation

Rating *
Fully Met

Comment
Colleague consistently performs at a proficient level, achieving and sometimes exceeding expectations, making positive contributions. Works independently without review of individual pieces, however final product or performance may or may not be reviewed. Recognized as a mentor, role model and resource to colleagues, often advising others. Demonstrates initiative and independence. Engages in problem solving. Continues to refine skills and learn from new experiences. Displays the ability to improve the process by offering expertise/knowledge.

Summary

Section Weight
70

Next

Colleague Complete Self-Evaluation (continued)

21. (Optional) Click **Add** to expand the **Supporting Documents** section.
22. (Optional) Click **Attach** to navigate to the file location and select the desired document.
23. (Optional) Repeat as necessary to add more documentation.
24. Click **Next** to continue to the next section.

Supporting Documents Window

Core Values

Role Specific Job Duties

Supporting Documents

Summary

Upload relevant documents (PDF, Word, Excel, PowerPoint) to include with your performance evaluation. Do not upload documents that contain confidential information such as medical or leave of absence status, demographics.

Example of acceptable documents:

- Competency Checklist
- Accolades received during the performance year.
- Certificates of Completion

Supporting Documents

Employee

Add

Supporting Documents Expanded Window

Supporting Documents

Employee

Evaluation Supporting Document (empty)

File

Attach

Updated By (empty)

Upload Date (empty)

Comment

> Details

Add

Organize Open Include in library E-mail Burn New folder

Favorites

Desktop

Downloads

Recent Places

File folder

Certificate of Achievement for Continuous Learning Microsoft Word Document

Back

Next

Note: After adding an attachment, you may click the **Undo** button to remove the recently attached document.

25. Review the information provided in the **Summary**.
26. Click **Submit** to submit the self-evaluation.
OR
Click **Save for Later** to save the progress and return later.
OR
Click **Close** to have the task remain in your inbox. Workday auto-saves information.

Colleague Complete Self-Evaluation (continued)

Summary Window

Summary

Section Weight
70

Employee Evaluation

Rating
Fully Met

Colleague consistently performs at a proficient level, achieving and sometimes exceeding expectations, making positive contributions.
Works independently without review of individual pieces, however final product or performance may or may not be reviewed.
Recognized as a mentor, role model and resource to colleagues , often advising others.
Demonstrates initiative and independence.
Engages in problem solving.
Continues to refine skills and learn from new experiences.
Displays the ability to improve the process by offering expertise/knowledge.

Supporting Documents

Guide Me

Employee

Add

Submit Save for Later Close

27. Review the **Event** pop-up; take note of other upcoming tasks.
28. End of process.

Confirmation Event Pop-Up

Success! Event submitted

Up Next: Mirival, Jane (3145530), 2020-21 Complete Manager Evaluation

[View Details](#)