

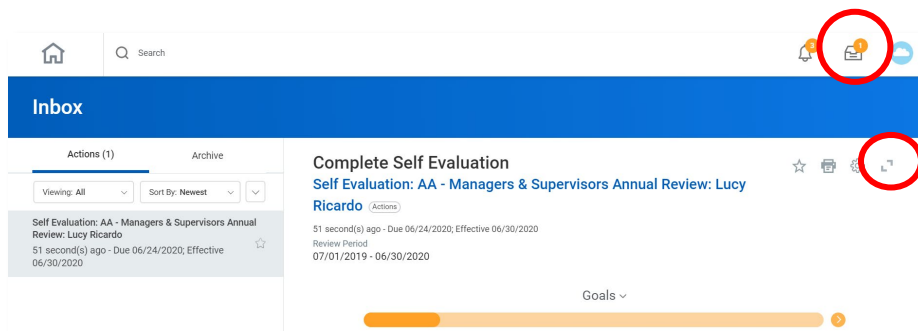


EMPLOYEE TRAINING GUIDE – ADMINISTRATORS’ ASSOCIATION PERFORMANCE APPRAISAL

A Self Evaluation is required for Administrators’ Association employees.

ACCESS THE SELF EVALUATION

- Navigate to your Workday inbox. Select “Self Evaluation.”
- Expand the template with the “**Toggle Full Screen Viewing Mode**” button for a full-screen view of the self evaluation template.



GOALS

Probationary employees, **SKIP THIS STEP**. You will be prompted to develop goals with your manager directly after your 3-month evaluation is complete.

Add (performance) goals* completed or in-progress from the 2019-2020 year. If you and your manager have not formally agreed on goals for this time period, click Next to skip this step. Do not add new goals at this time. You will be prompted to do this after your evaluation is complete. In subsequent years, your goals will automatically populate here for a rating.

- Click **Add**
- Add the name of the goal in the **Goal** field
- Add a description in the **Description** field
- Add a **Due Date**
- Select a **Status** (add a completion date if you selected Completed)
- **Milestones** break a large goal down into manageable action items. These are optional. Add as desired.
- Select a **Rating**
- Add a **Comment**
- Click **Next** to proceed or **Add** to add another goal

*The primary difference between the two types of goals is that performance goals focus on an end result while development goals focus on the attainment of skills and knowledge. Additionally, performance goals are job-oriented, while developmental goals are learning-oriented.

Use Existing Goal ☐

Goal *

Normal **B** **I** **U** **A** **Color** **Link**

Name the Goal

Description

Normal **B** **I** **U** **A** **Color** **Link**

Describe the goal.

Due Date

05 / 15 / 2020 **Calendar**

Status

Completed

Completed On

05 / 15 / 2020 **Calendar**

Employee Evaluation

Rating *

select one

Comment *

Format **B** **I** **U** **A** **Color** **Link**



EMPLOYEE TRAINING GUIDE – ADMINISTRATORS’ ASSOCIATION PERFORMANCE APPRAISAL

COMPETENCIES

- Navigate through each **Competency** of the Evaluation
- Assign a **Rating** to each
 - The last competency Impact on Students/Student Learning Outcomes may not apply to every role. If this competency is not applicable to your role, select Not Applicable in the rating, and note Not Applicable in the Comments section. Not Applicable is not an appropriate rating for any other competency and should not be used.
- Enter **Comments**
- Select the **Checkmark** on the right side of the Competency to save your responses
- Select the **Pencil** to expand the next section
- Select **Next** to navigate to the next section of the assessment

The screenshot shows the 'Competencies' section of the performance appraisal system. At the top, there is a header 'Competencies' with a dropdown arrow. Below this is a progress bar with orange segments. The main content area displays the 'Leadership and Supervision' competency. It includes a 'Category' of 'Managers and Supervisors' and a 'Description' that reads: 'Providing clear direction to team members, having the courage to take on difficult and complex assignments, having creativity, having inspiration to motivate others, and follow-through and delivery on commitments.' Below the description is the 'Employee Evaluation' section, which features a 'Rating' dropdown menu set to 'Exceptional' and a text area for 'Comment' with a rich text editor toolbar. To the right of the competency name are icons for a pencil and a checkmark.

PROFESSIONAL/PERSONAL ENHANCEMENT PLAN

Probationary employees, **SKIP THIS STEP**. It is not necessary to focus on your professional/personal enhancement during your first year.

Add development goals, as desired. The primary difference between the two types of goals is that performance goals focus on an end result while development goals focus on the attainment of skills and knowledge. Additionally, performance goals are job-oriented, while developmental goals are learning-oriented.

- Add the name of the **Development Item**
- Describe the Development Item in **Additional Information**
- Select a Status
- Click **Next** to proceed or **Add** to add another Development Item

The screenshot shows the 'Professional/Personal Enhancement Plan' section. At the top, there is a header 'Professional/Personal Enhancement Plan' with a dropdown arrow. Below this is a progress bar with orange segments. The main content area includes a 'Use Existing Development Item' checkbox, a 'Development Item' text field, and an 'Additional Information' text area with a rich text editor toolbar. Below these fields are 'Start Date' and 'Completion Date' date pickers, and a 'Status' dropdown menu. To the right of the 'Use Existing Development Item' checkbox are icons for a pencil and a checkmark.



SUPPORTING DOCUMENTS

Attaching supporting documents is optional. Examples of supporting documents might include: an email from a colleague, work product, relevant metrics, etc.

- Navigate to the **Supporting Documents** section of the template.
- Select the **Add** button and then select the **Attach** button.
- Select your supporting documents.
- Select **“Next”**.

Supporting Documents ▾

< [Progress Bar] >

Employee

Add

Supporting Documents ▾

< [Progress Bar] >

Employee

Evaluation Supporting Document
(empty)

File

Attach

OVERALL

- Assign an overall **Rating**
- Enter **Comments**

Overall ▾

< [Progress Bar] >

Employee Evaluation

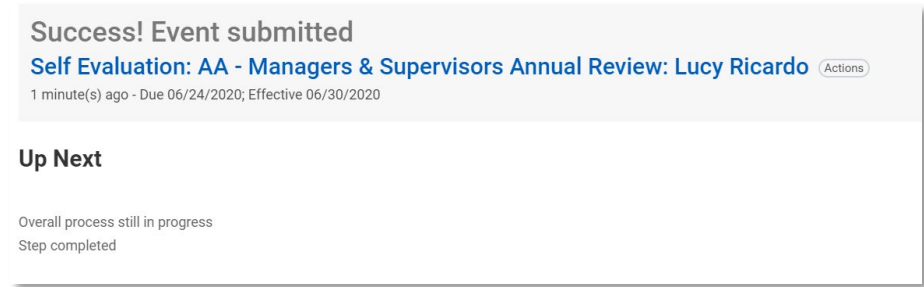
Rating *

Comment *



SUBMIT COMPLETED SELF EVALUATION

Navigate to the **Summary** section of the template and select the **Submit** button to finalize the self evaluation. The self evaluation is then routed to your manager.



SAVE FOR LATER

- Save the evaluation task for later if you are unable to complete all of the sections at one time.
- Navigate to the **Summary** section of the template and select the **Save for Later** button.
- Access the evaluation template in your Workday inbox to continue with the evaluation.

PARTICIPATE IN 1:1 DISCUSSION

- Conversations about your goals for the upcoming year may take place during this meeting. Your manager will be prompted to enter them into Workday after the evaluation process. Reference the Admin Association Guide to Goals for next steps and your opportunity to review and edit your goals.

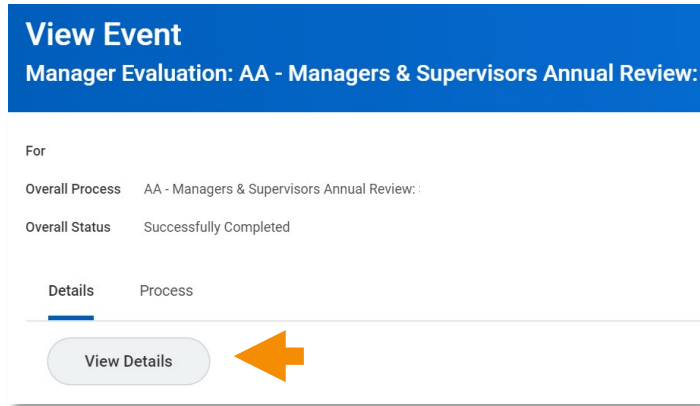
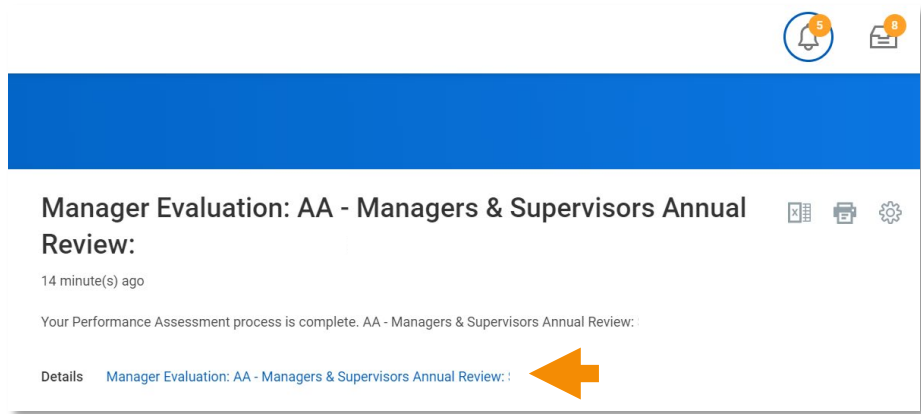
Probationary employees, reference the Admin Association Guide to Goals to develop goals after your 3-month evaluation.

EMPLOYEE ACKNOWLEDGEMENT (After 1:1 Discussion)

- Navigate to your Workday inbox.
- Enter **I Acknowledge** in the **Status** field, and enter any final comments as a result of the 1:1 meeting.
- Select **Submit**.
- You will receive a Workday notification that the evaluation process is complete once HR has reviewed the document.

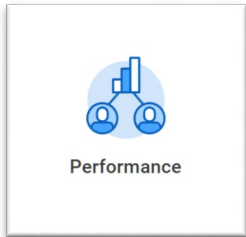
EMPLOYEE - VIEW COMPLETED EVALUATION

- Navigate to your Workday **Notifications**.
- Select the **Details** link to review the details of the entire process.



PERFORMANCE WORKLET

- Add the Performance Worklet to your Workday home page.



- **From the worklet you can:**
 - View completed evaluations
 - View goals and development items