MANAGER'S EVALUATION

Navigate to your Workday inbox to access the employee's self evaluation. Expand the template with the "**Toggle Full Screen Viewing Mode**" button for a full-screen view of the evaluation.

GOALS

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

Review (performance) goals* from 2019-2020, if any, added by employee. Select a rating and provide a comment on the employee's performance as it relates to each goal. If necessary, edit the goal (click the pencil).
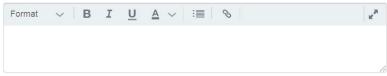
*The primary difference between the two types of goals is that performance goals focus on an end result while development goals focus on the attainment of skills and knowledge. Additionally, performance goals are job-oriented, while developmental goals are learning-oriented.
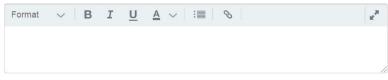

You may also add more 2019-2020 goals, if necessary. <u>Do not add new goals at this time</u>. **You will be prompted to do this after the evaluation process is complete. In subsequent years, employee goals will automatically populate here for a rating.**

- 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

COMPETENCIES

- Navigate through each **Competency** of the Evaluation
- Assign a **Rating** to each
  - The last competency <u>Impact on Students/Student Learning Outcomes</u> may not apply to every role. If this competency is not applicable to the 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 evaluation

PROFESSIONAL/PERSONAL ENHANCEMENT PLAN

For probationary employees, **SKIP THIS STEP**. It is not necessary for the employee to focus on professional/personal enhancement during their first year.

Review development items*, if any, added by the employee.
*The primary difference between the two types of goal 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. These goals are not given a rating.

Although development items can technically be edited or new ones added, this is discouraged. To best support your employee in their professional/personal enhancement, have a discussion about these in the goal-setting conversation after the evaluation process is complete.

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
- Select the **Add** button and then select the **Attach** button.
- Select your supporting documents.

OVERALL

- Assign an overall **Rating**
- Enter **Comments**
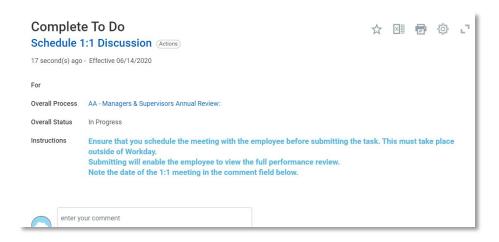
SUBMIT COMPLETED MANAGER EVALUATION

- Navigate to the **Summary** section of the template.
- Submit the template. The template routes to the next level manager for review.

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.

SCHEDULE DISCUSSION

- Navigate to your Workday inbox to access the **Schedule a 1:1** To-Do task. This is the reminder to schedule a 1:1 meeting with the employee to discuss the evaluation. Scheduling of the 1:1, and notifying the employee of the 1:1 meeting date take place outside of Workday.
- Select **Submit** to route the completed evaluation to the employee.

Complete To Do
Schedule 1:1 Discussion (Actions)

17 second(s) ago - Effective 06/14/2020

For	
Overall Process	AA - Managers & Supervisors Annual Review:
Overall Status	In Progress
Instructions	Ensure that you schedule the meeting with the employee before submitting the task. This must take place outside of Workday. Submitting will enable the employee to view the full performance review. Note the date of the 1:1 meeting in the comment field below.

enter your comment

- Navigate to the **Provide Manager Review Comments** task in your Workday inbox. Select **Save for Later**. This task will be completed and submitted after the 1:1 meeting with employee.
- Conduct the 1:1 meeting with the employee. In this meeting, begin conversations about the employee's goals for the upcoming year. This applies to probationary employees, as well. You will be prompted after the evaluation process to enter them into Workday.

MANAGER ACKNOWLEDGEMENT (After 1:1 discussion)

- Navigate to the **Provide Manager Reivew Comments** task in your Workday inbox after the 1:1 meeting. Enter **I Acknowledge** the review in the **Status** field, and enter any final comments resulting from the 1:1 with the employee.
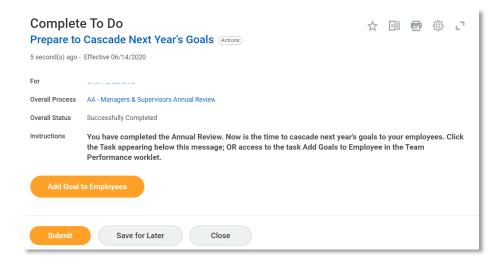- Select **Submit**.

Provide Manager Review Comments
Manager Evaluation: AA - Managers & Supervisors Annual Review:
Evaluated By

4 second(s) ago - Due 06/30/2020; Effective 06/16/2020

Acknowledgement

Manager Acknowledgement
Status *

Comment

FINAL STEPS

Once the employee has made their acknowledgement and HR has reviewed the document two things will happen:

- You will receive a Workday notification that the evaluation process is complete. Click on the link and **View Details** to view.
- You will receive the following task in your Workday inbox: "Prepare to Cascade Next Year's Goals." Reference the **Administrators' Guide to Goals** for next steps.

ADD TEAM PERFORMANCE WORKLET

Add the Team Performance worklet to your Workday home paage.

From the worklet you can:

- View goals and development items
- Completed evaluations