



QUICK START GUIDE – CSEA OR CONFIDENTIAL EMPLOYEE ANNUAL ASSESSMENT – MANAGER

MANAGER

MANAGER'S ASSESSMENT

- Navigate to your Workday inbox to access the employee's self-assessment.
- Assign a rating and enter comments in each section of the assessment template. Ratings and Comments are required. If the employee completed the self-assessment, consider their input as you complete your ratings.
- Navigate to the Goals for Growth section. Review goals, if any, added by employee. Edit as necessary. Add additional goals, as desired. Goals for growth are optional for ratings of meet or exceeds, mandatory for ratings of need improvement or does not meet standards.
- Each goal must be specific, measurable, attainable, relevant and time bound. State the Goal; how it will be measured, the Start and End Date. Indicate the resources needed: (time, money, assistance, etc.). Milestones break a large goal down into manageable action items. These are optional. Add as desired.
- Navigate to the **"Supporting Documents"** section of the template. Select **"Add"** then select **"Attach"**. Supporting Documents are optional.
- Select your supporting documents.
- Navigate to the **"Summary"** section of the template.
- Submit the template. The template routes to the next level manager for review.

SAVE ASSESSMENT FOR LATER

- Save the-assessment 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 assessment template in your Workday inbox to continue with the assessment.

MANAGER COMPLETES ASSESSMENT

- 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 assessment. 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 assessment to the employee.
- 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.

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"**.
- You will receive a Workday notification that the process is complete once the employee has made their acknowledgement and HR has reviewed the document.