



QUICK START GUIDE - MANAGER GUIDE

CSEA OR CONFIDENTIAL EMPLOYEE PROBATIONARY ASSESSMENT

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 **"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'S MANAGER

MANAGER'S MANAGER REVIEW

- Navigate to your Workday inbox to access the assessment.
- Review the manager's and employee's ratings and comments.
- Contact the manager off-line if discussion is needed. **"Send Back"** the template to the manager, if needed.
- Select **"Approve"**. The assessment routes to the manager for next steps.

MANAGER

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.
- 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.