



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

ACCESS THE SELF-ASSESSMENT

- Access the self-assessment in your Workday inbox.
 - OR
- Access the self-assessment from your Workday home page.

COMPLETE THE SELF-ASSESSMENT

- **Self-Assessment is optional for CSEA and CONFIDENTIAL employees.** To opt-out, skip to the end of this guide for instruction.
- Navigate to your Workday inbox to open the self-assessment.
- Expand the template with the **“Toggle Full Screen Viewing Mode”** button for a full-screen view of the self-assessment.
- Follow the Guided Editor through each section of the self-assessment
- Assign a rating to each Standard (competency). Enter any comments in the **“Answer”** section of each Standard.
- Professional Growth activities are optional.
- Goals for Growth are optional. Add goals, as desired. Your manager may also add goals while completing the evaluation. Milestones break a large goal down into manageable action items. These are optional. Add as desired.

SAVE SELF-ASSESSMENT FOR LATER

- Save the self-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 **“Save for Later”**.
- Access the self-assessment in your Workday inbox to continue with the self-assessment.

ATTACH SUPPORTING DOCUMENTS

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

SUBMIT COMPLETED SELF-ASSESSMENT

- Navigate to the **“Summary”** section of the template.
- **“Submit”** to finalize the self-assessment. The self-assessment is then routed to your manager/supervisor.

VIEW SELF-ASSESSMENT

- After the manager completes the assessment and schedules a 1:1 meeting, employee receives notification.
- Navigate to the Workday Notifications bell. Select the **“Details”** link to view the assessment.
- Review the assessment before the 1:1 meeting.



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EMPLOYEE ACKNOWLEDGEMENT

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

OPT-OUT OF SELF-ASSESSMENT

- Navigate to the **“Gear”** icon in the upper right hand corner of the self-assessment task, and select **“Skip This Task”**.
 - **OR**
- Navigate to the **“Summary”** section of the self-assessment and select **“Submit”**.