

## Overview

This job aid outlines the activities for a manager to upload an employee's performance evaluation document and enter the overall rating as a part of the performance review process. When performance evaluations are launched in Workday managers will receive an inbox task for each staff and faculty employee they supervise.

### Prerequisites:

- An approved performance evaluation form must be completed outside Workday. Employees previously evaluated using the non-faculty performance evaluation template in GreatJobs will be evaluated using the AG-404, Staff Performance Evaluation (<https://agrillifeas.tamu.edu/documents/ag-404.pdf>) Performance evaluations forms and resources: <https://agrillifeas.tamu.edu/hr/supervisor-toolkit/performance-management/>
- Manager and employee have met to discuss performance evaluation.

### Important Information:

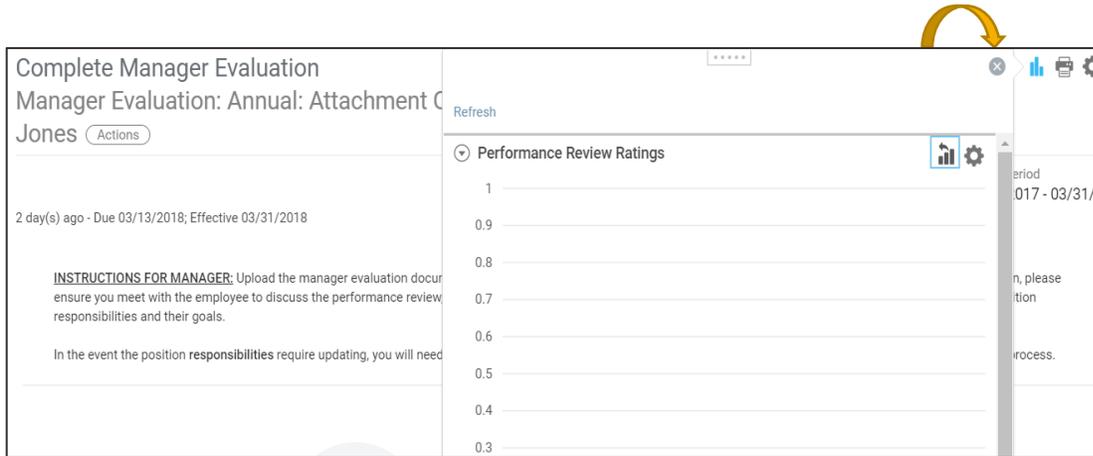
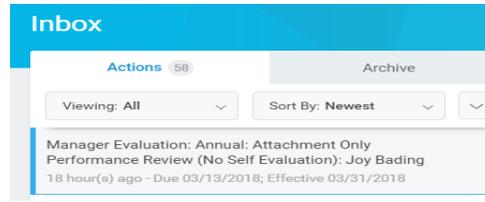
- **Once a performance evaluation has been submitted to the employee it cannot be edited or deleted.** It is important that you review the contents of the performance review carefully prior to submitting,
- The review period dates shown in Workday will be April 1 – March 31. The performance evaluation form attached should include actual time period of review if different.
- AgriLife will use the attachment only option which is the performance review template that allows uploading of a performance review completed outside of Workday. Performance Evaluation forms: <https://agrillifeas.tamu.edu/documents/evaluation-matrices.pdf>
- The Manager receives an inbox task to complete employee evaluation and enter overall rating. A manager may delegate the inbox task if another individual will be uploading the document.
- All action items received through the Workday Inbox include the employee's name.
- Guided tours are available after the process has started by clicking the  icon in the top right hand corner of your screen. Guided tours provide additional on-screen help, if needed.
- Managers may notice an alert  1 Alert indicating not all sections on the performance evaluation are visible to the employee. This alert does not impact anything and managers can proceed with the evaluation.

## Manager Completes Evaluation

From the Workday Home page:

1. Click the **Inbox** worklet
2. Click the “Manager Evaluation” action item

Close the “Performance Review Ratings” window ...



... and select one of the editors



3. Upload the previously completed performance evaluation document: Click “Add” to attach the evaluation.
4. Select an Overall Rating and provide a comment if needed: Click the pencil icon  to complete the rating and the check mark to save the information .

**Note:** **Comment** is required if the **Rating** is “Does not meet expectations” or “Partially Meets Expectations”.

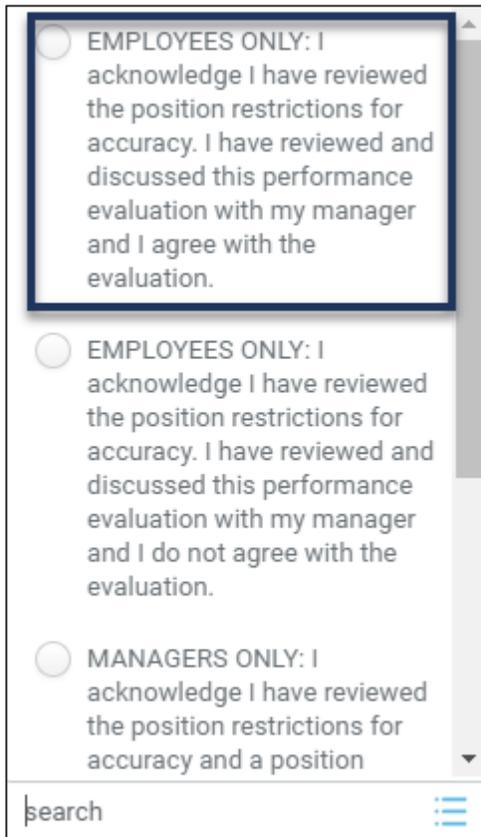
5. Click **Submit** or **Save for Later** (if you are not ready to submit to the employee). When you click **Submit** an inbox item is sent to the employee to review and acknowledge the evaluation. You will receive a confirmation message:



## Employee Acknowledgement of Evaluation

1. Click the **Inbox** worklet
2. Click the “Manager Evaluation” action item
3. Click the pencil icon  to make the selection for acknowledgement.

In the **Status** field, select an appropriate “Employees Only” option\*



EMPLOYEES ONLY: I acknowledge I have reviewed the position restrictions for accuracy. I have reviewed and discussed this performance evaluation with my manager and I agree with the evaluation.

EMPLOYEES ONLY: I acknowledge I have reviewed the position restrictions for accuracy. I have reviewed and discussed this performance evaluation with my manager and I do not agree with the evaluation.

MANAGERS ONLY: I acknowledge I have reviewed the position restrictions for accuracy and a position

search 

To View Job Description:

Select “View Profile”  Jennifer Hobbs  
View Profile

Job Details

Employee ID

Organization

Position

1. Click “Position” in Job Details section

4. Enter a comment, i.e., date/time when you met with your manager to discuss the performance review, if needed.
5. Click **Submit**. This action sends an inbox item to the manager to review and finalize the evaluation.

## Manager's Acknowledgement of Evaluation

From the Workday Home page:

1. Click the **Inbox** worklet
2. Click the "Manager Evaluation" action item
3. In the **Status** field, select an appropriate "Manager Only" option. If position restrictions require editing notify your HR Contact.

## Manager Feedback

### Manager Acknowledgment

Status ✖

search ☰

agree with the evaluation. ▲

MANAGERS ONLY: I acknowledge I have reviewed the position restrictions for accuracy and a position restriction update is required. I have reviewed and discussed this performance evaluation with the employee.

MANAGERS ONLY: I acknowledge I have reviewed the position restrictions for accuracy and a position restriction update is not required. I have reviewed and discussed this performance evaluation with the employee. ▼

Evaluation Supporting Document

4. Enter a comment, if needed.
5. Click **Submit**. This completes the performance evaluation process.