

Revised March 13, 2018

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
 (<u>https://agrilifeas.tamu.edu/documents/ag-404.pdf</u>) Performance evaluations forms and
 resources: https://agrilifeas.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 evalution 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: <u>https://agrilifeas.tamu.edu/documents/evaluation-matricies.pdf</u>
- 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 2 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 ...

Complete Manager Evaluation Manager Evaluation: Annual: Attachment C	Defeat	⊗ > ı⊾ 🖶 ¢
Jones (Actions)	Performance Review Ratings	în 🌣 Î
2 day(s) ago - Due 03/13/2018; Effective 03/31/2018	0.9	.017 - 03/31/
INSTRUCTIONS FOR MANAGER: Upload the manager evaluation docur ensure you meet with the employee to discuss the performance review	0.8	n, please tion
responsibilities and their goals. In the event the position responsibilities require updating, you will need	0.6	rocess.
	0.4	

... and select one of the editors

Inbox

Viewing: All

Actions 58

Archive

✓ Sort By: Newest

Manager Evaluation: Annual: Attachment Only Performance Review (No Self Evaluation): Joy Bading 18 hour(s) ago - Due 03/13/2018; Effective 03/31/2018

Go to Guided Editor	Go to Summary Editor	
A simple step-by-step guide	Edit everything on one page	





- **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

Complete Manager Eva Manager Evaluation: A Bading (Actions)	aluation nnual: Attachment Only Performance Review (No Self Evaluation): Joy	*	սհ ∈	¢.5	?
18 hour(s) ago - Due 03/13/2018; Effectiv	re 03/31/2018	Review 04/01	Period /2017	- 03/31/	2018
INSTRUCTIONS FOR MANAGER; Upload with the employee to discuss the perform	the manager evaluation document in the Attachments section of this performance review. Upon completion of the Manager Evali mance review, provide feedback on strengths and areas for development in relation to our core competencies, the position response	uation, p sibilities	lease er and the	isure you r goals.	meet
In the event the position responsibilities	require updating, you will need to initiate the Edit Position Restrictions business process upon completion of the performance rev	iew proc	ess.		
Attachments				Guid	de Me
Manager Add					
Overall Rating				Guid	e Me
Manager Evaluation				← .	/
Rating Significantly Exceeds Expectatio V					
select one					
Does Not Meet Expectations					
Partially Meets Expectations	✓ :■ Ø				
Meets Expectations					
Exceeds Expectations					
Significantly Exceeds Expectations					

<u>Note</u>: 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.	a nd	To View Job Description: Select "View Profile"	Job Details
EMPLOYEES ONLY: I acknowledge I have reviewed the position restrictions for accuracy. I have reviewed an discussed this performance evaluation with my manager and I do not agree with the evaluation.	d nd	1. Click "Position" in Job Details section	Employee ID Organization Position
MANAGERS ONLY: I acknowledge I have reviewe the position restrictions for accuracy and a position	d •		
search	≔		

- 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

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	agree with the evaluation.	•
\bigcirc	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.	ļ
	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.



