Texas A&M AgriLife

Performance Review for Manager and Employee

Revised April 3, 2019

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://agrilifeas.tamu.edu/documents/ag-404.pdf) Performance evaluations forms and resources: https://agrilifeas.tamu.edu/hr/supervisor-toolkit/performance-management/

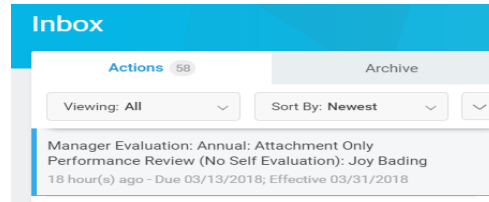- Manager and employee have met to discuss performance evaluation.

Important Information:

- If a performance evaluation has been submitted to the employee but not yet acknowledged, the manager can recall the evaluation for edits: My Team Performance worklet from your Workday home page => Actions => My Teams's Performance Reviews => Send Back

- The review period dates shown in Workday are 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: https://agrilifeas.tamu.edu/documents/evaluation-matricies.pdf

- The Manager receives an inbox task: *Manager Evaluation*.

- The Manager needs to complete employee evaluation and enter overall rating. A manager may delegate the inbox task if another individual will be uploading the document. Delegate uploading of employee evaluations by delegating these business processes: *Complete Manager Evaluation for Performance Review*, *Start Performance Review*.

- 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 and select one of the editors.

Go to Guided Editor
A simple step-by-step guide

Go to Summary Editor
Edit everything on one page

3. *Attachments*

Upload the previously completed performance evaluation document: Click "Add" to attach the evaluation.

Add a summary comment.

4. *Overall Rating*

Enter a rating

Comment is required if the Rating is "Does not meet expectations" or "Partially Meets Expectations".

5. *Manager/Employee Review Meeting*

NEW: Manager must answer "YES" or "NO" to indicate if a meeting with their employee has

occurred and if the review will not need changes/edits. Please select "save for later" on the Summary page if meeting with employee has not occurred.
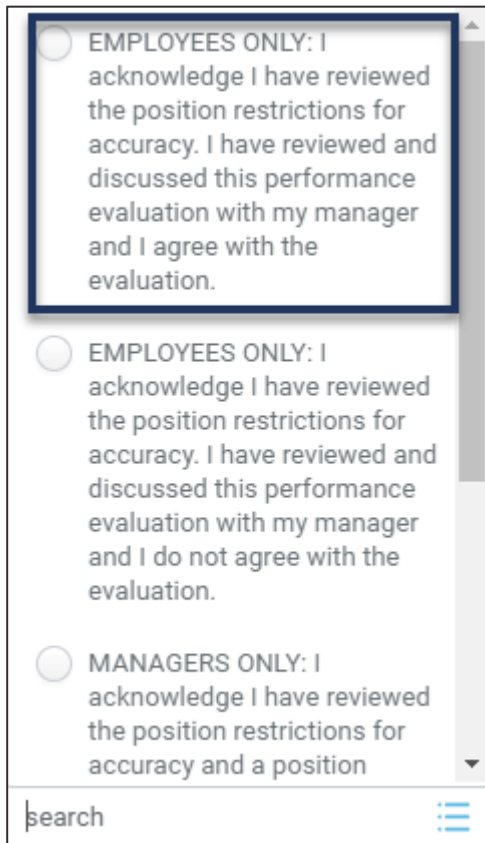
Click **Submit** or **Save for Later** (if you are not ready to submit to the employee). When you click **Submit** an inbox item is sent to the employee to review and acknowledge the evaluation. You will receive a confirmation message:

Employee Acknowledgement of Evaluation

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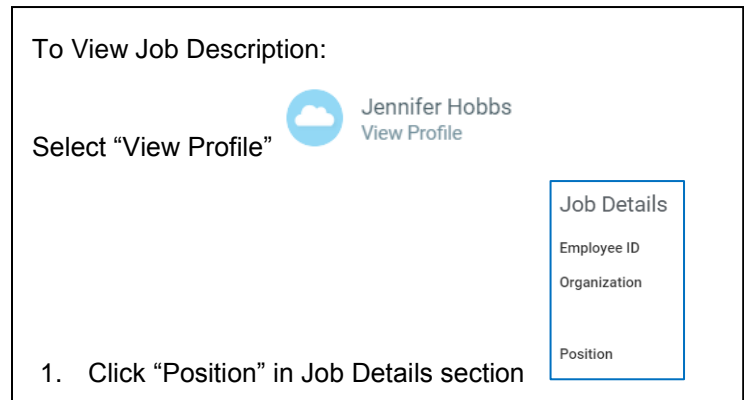3. Click the pencil icon [pencil icon] to make the selection for acknowledgement.

   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

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To View Job Description:

Jennifer Hobbs
View Profile

Select "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.

THE TEXAS A&M UNIVERSITY SYSTEM | workday.

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 *

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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.