Complete Performance Review – Faculty (Employee)

Overview

This job aid outlines the activities for a Faculty Member to complete a Performance Evaluation that uses the Faculty template

Prerequisites: The Performance Review process must be initiated by the appropriate security role in Workday

Important Information:

- Existing goals on the Employee profile are locked once the Performance Review is launched for the system member and are no longer editable. However, goals can be added and edited from within the performance review inbox task. Changes will populate onto the Employee’s worker profile when the performance review is complete

Steps

Read the directions provided within the inbox task in Workday. Click Get Started to begin

First, you will begin your Performance Review by completing your self-evaluation. Please follow the steps provided

Attachments (Optional)

Employees have the option to add attachments relevant to the performance review. You can click Next to move to the next section of your self-evaluation if you have no documents to upload

1. Click Select files. Locate and select the file you would like to upload to the performance evaluation
2. Click **Upload** to select additional files if desired

3. You may want to add a comment to provide helpful information as to why this document was added to the review

4. Click **Next**

**Goals**

Not all departments use this feature. If goals are not relevant for your performance review, you can use the **Next** button to move to the next section of the review
1. Review each goal, update the **Status** and **Completed On** date as applicable

![Employee](image)

**Note:** If no goals are listed you can also click **Add** to add an existing or new goal

2. Rate yourself on each goal listed and include comments

![Employee](image)

3. Click **Next**

**Competencies**

All positions across the Texas A&M University System have competencies on which you are evaluated
1. Rate yourself on each competency and provide comments

2. Click **Next**

**Progress Toward Tenure**
If this section is not relevant to your position, you can use the **Next** button to move to the next section of the review

1. Provide comments in response to the question

2. Click **Next**

**Overall Rating**
The Overall Rating is the final evaluation score for yourself based on all information written within the performance review

1. Select your **Rating** for your performance
2. Click **Next**

**Review and Submit**

1. Review the evaluation information to be sure no more edits are needed
2. Click **Submit** only when you are ready to move the process forward and no more changes are needed
3. You can click **Save for Later** if you have not or if you need to make changes

**Note:** If any changes are needed after submitting, search for the My Team’s Performance Review report and select **Send Back**. It will route back to you and you can make changes accordingly

**Up Next**

Your Manager will now receive an inbox task that contains the information you provided in order to complete their evaluation of your performance

The Employee and Manager may meet at this point or earlier, prior to submission by the Manager, to discuss the performance evaluation. Once your Manager submits the performance evaluation in Workday, you will be able to view all of the information provided and acknowledge

**Employee Submits Acknowledgement**

Your Manager has completed the your performance review

1. Click **Get Started**

2. You can review all information provided by you in your self evaluation, your Manager and any Additional Managers that were added to the review. Your overall rating will also be visible
3. **Click Next**

4. **Select the appropriate Status Option** that represents your agreement or disagreement with the performance evaluation

5. **Click Submit**

**Up Next**

Your Manager will submit their acknowledgement of the performance evaluation
Be Advised:

- If the Manager selects the option that denotes an update to your position restrictions is required, this process will be routed to the appropriate person at your member.
- If your Overall Rating is Partially Meets Expectations or Does Not Meet Expectations, your Manager receives a To Do to Complete a Performance Improvement Plan.

This completes the Complete Performance Evaluation process for those using the Faculty template.
Complete Performance Review – Faculty (Manager)

Overview

This job aid outlines the activities for a Manager to complete a Performance Evaluation that uses the Faculty template

Prerequisites: The Performance Review process must be initiated by the appropriate security role in Workday

Steps

Manager Evaluates Employee

You can begin the evaluation immediately.

Manager Completes Evaluation

1. Review documents provided by your Employee (if applicable)
2. Click Select files if you would like to add any supporting documentation for the evaluation. Locate and select the file you would like to add
3. Click Upload to select additional files if desired
4. Click Next

Goals (if applicable)

Not all departments use this feature. If goals are not relevant for your performance review process, you can use the Next button to move to the next section of the review
1. Rate your Employee on each goal and enter any relevant comments

2. Click Next

Competencies

All positions across the Texas A&M University System have competencies on which you evaluate your Employees.

1. Rate your Employee and add any applicable comments for each competency listed

2. Click Next

Progress Toward Tenure

This section is only required for tenure related evaluations (annual tenure track and post tenure review). This section is not required for Annual or Professional Track reviews

1. Click in the Response field to edit (you may ignore this section if it does not apply to you)

Overall Rating

The Overall Rating is the final evaluation score for your Employee based on all information within the performance review

1. Select your Rating for the Employee’s performance
IMPORTANT: Comments are required if the Rating selected is Does Not Meet Expectations or Partially Meets Expectations. The performance review will then route to the Manager’s Manager for approval.

2. Click Next

Manager / Employee Review Meeting
You will be reminded that you should meet with your Employee to review the Position Restrictions and the Employee’s evaluation.

1. Answer the question regarding the meeting
   - Selection Yes if you have already met with your Employee
   - Select No if you have not met with your Employee

   Note: You will be able to move forward with the process regardless of the answer selected on this question

2. Click Next

Review and Submit

4. Review the evaluation information to be sure no more edits are needed

5. Click Submit only when you are ready to move the process forward and no more changes are needed and you have met with your Employee

6. You can click Save for Later if you have not yet met with the Employee or if you need to make changes

   Note: If any changes are needed after submitting, search for the My Team’s Performance Review report and select Send Back. It will route back to you and you can make changes accordingly

Up Next

Once you submit the evaluation, your Faculty member will receive a task to acknowledge agreement or disagreement with the evaluation and that they have reviewed their current Position Restrictions with you. The Faculty member will then submit the Acknowledgment of the performance evaluation.

Manager Submits Acknowledgement

1. Click Get Started on the inbox task

2. Review the Summary of information provided
3. Click **Next**

4. Select the appropriate Status option that represents whether Position Restrictions do or do not need updating

5. Enter comments as needed

6. Click **Submit**

**Up Next**

- If you selected the option that includes "**position description update required,**" you or your HR Contact or HR Partner will receive a To Do to **Edit Position Restrictions**

- If the Overall Rating is Partially Meets Expectations or Does Not Meet Expectations, you will receive a To Do to **Complete a Performance Improvement Plan**