Complete Performance Review – Staff (Employee)

Overview

This job aid outlines the activities for an Employee to complete a Performance Evaluation using the Staff templates

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

Get Started

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

Complete Self Evaluation

If you have a self-evaluation included in your Performance evaluation, follow the steps provided below. Otherwise, skip to the Employee Submits Acknowledgment section
**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
5. Review each goal, update the **Status** and **Completed On** date as applicable

![Status and Completed On options]

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

6. Rate yourself on each goal listed and include comments

![Rating and Comment options]

7. Click **Next**

**Competencies**

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

9. Click Next

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

10. Rate yourself on each competency listed and provide comments

11. Click Next

**Responsibilities**
Responsibilities vary across positions. Follow the instructions provided to view the responsibilities assigned to your position

12. Enter a rating for your evaluation of your performance in completing these responsibilities and add comments as appropriate
13. Click **Next**

**Certification Question**

This section is about required trainings you may have been assigned during the evaluation period.

14. Select the appropriate answer in the **Rating** field:
   - Select **Yes** if you are past due on required trainings
   - Select **No** if you are not past due on required trainings

**Note:** If you select **Yes**, you may want to add a comment.

15. Click **Next**

**Review and Submit**

This section allows you to review the information you completed in its entirety. You can make edits if necessary.
16. Review the information and make any edits
17. Click Submit

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 (if applicable), 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 Staff template.
Complete Performance Review – Staff (Manager)

Overview

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

Prerequisites: The Performance Review process must be initiated by the appropriate security role in Workday. If your Employees are assigned a Performance Review template that includes a self-evaluation, you will not be able to begin your evaluation of the Employee until the self-evaluation has been submitted.

Steps

Manager Evaluates Employee

You can begin the evaluation immediately.

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

**Supervisory Competencies**

You will evaluate your Employees that are Supervisors according to these competencies.

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

2. Click Next

**Review of Responsibilities**

Responsibilities vary across positions. Follow the instructions provided to view the responsibilities assigned to this position.

1. Enter a rating for your evaluation of your Employee’s performance on these responsibilities and add comments as appropriate

2. Click Next
2. Click **Next**

**Certification Question**

This section is about required trainings your Employee was assigned during the evaluation period.

18. Select the appropriate answer in the **Rating** field:
   - Select **Yes** if your Employee is past due on required trainings.
   - Select **No** if your Employee is not past due on required trainings.

**Note:** If you select **Yes**, you may want to add a comment.

19. Click **Next**

**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**

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

This completes the process for a Manager to complete a performance evaluation for an Employee using the Staff template