Completing the Annual Performance Review in Workday

Purpose
The objective of this User Guide is to demonstrate and guide users through all steps required for completing the Annual Performance Review in Workday. The actions listed in this guide apply to each user involved in the completion of the performance review process: *Teammate, People Leader*, and *Indirect People Leader* users.

Contents

Complete the Set Content Step | *People Leader*

1. As a people leader, from the homepage, click **Set Content…** task for your direct report, displayed in *Awaiting your Action*.
2. Click **Get Started**.
3. On the **Self-Evaluation** page, click **Next** to proceed to the competencies section.
4. At the competencies section, enter a value of **20** in the weighting percentage boxes for each of the five competencies.
5. Click **Next** to proceed to the **SMART Goals** screen.
6. Confirm the annual performance goals were processed into the SMART Goal screen.
   - **NOTE:** If there is a goal that was created but not pulled into the review you can manually pull it in. From the **SMART Goals** screen click **Add** > click into the **Add Existing** field > select **By Category** > choose **Annual Performance Goals.** Select the first goal and confirm the information fills in. Repeat this process until each probationary SMART goal has been added.
   - If SMART goals do not appear when selecting the *Annual Performance Goals* category option, check to see if they are associated with one of the other available category options instead. If no goals are present, manually fill in the goal fields instead. Click **Add** each time until all goals have been entered into the review.
7. Enter the weighting percentages for each SMART goal, if needed. Confirm the weighting percentage total equals **100.**
8. Click **Next.**
9. Scroll through the review summary page.
10. Click **Submit** to move the review forward so the teammate can begin their self-evaluation step.

Complete the Self-Review Step | *Teammate*

11. As the teammate, from the homepage, click **Self Evaluation…** task in *Awaiting Your Actions*.
12. On the **Complete Self-Evaluation** screen, click **Get Started.**
13. From the **Self-Evaluation** section, scroll to down and answer the five questions.

14. Click **Next**.
15. On the **Competencies** section, scroll down and fill in the comment box for each competency.
16. Click **Next**.
17. At the **SMART Goals** section, fill in the comment boxes regarding your probationary goals.
18. Click **Next**.
19. On the **Attachments** section, upload any attachments.
    - **NOTE:** The maximum file size is 30 MBs. Fill in corresponding comments boxes.
20. Click **Next**.
21. On the **Overall Rating Summary** section, share any final thoughts in the comment box.
22. Click **Next**.
23. Look over the read-only version of the review. Click **Submit** to route the review to your direct people leader.

Complete the Manager Evaluation | *People Leader*

24. From the home page, click **Manager Evaluation…** task in *Awaiting Your Action*.
25. On the **Complete Manager Evaluation** screen, click **Get Started.**
26. Look over the answers entered by teammate during their Self-Evaluation step. Fill in comment boxes regarding their answers.
27. Click **Next**.
28. Scroll through the **Competencies** section and enter a rating and a comment for each one. Under the **Manager Summary** you will see the Calculated Rating and Rating Description for their competency section.
29. Click **Next** and proceed to **SMART Goals**.
30. Scroll through the SMART Goals and enter ratings and comments. Under the **Manager Summary** you will see the Calculated Rating and Rating Description for their SMART goals.
31. Click **Next**.
32. On *Attachments*, click and review any attachments provided by the direct report. Add any attachments that may be relative to the probationary review.
    - **NOTE**: The maximum file size is 30 MBs.
33. Click **Next**.
34. On the **Overall Annual Performance Rating - Summary** screen, you will see the overall review rating and rating description displayed for your direct report. Enter any final comments.
35. Click **Next**.
36. Scroll through a read-only view of the review.
37. Click **Submit** to send review to the Indirect People Leader at the next step.

Approve the Performance Review | *Indirect People Leader*

38. From the home page, as the indirect people leader, click **Manager Evaluation…** task in *Awaiting Your Action*.
39. On the **Review Complete Manager Evaluation** screen, click **Get Started**.
40. Look over the read-only comments entered by the teammate and the ratings and comments submitted by their direct people leader.
    - *Attention:* In the Workday review process, the indirect people leader has the ability to change/edit any ratings and/or comments entered by the reviewing people leader, during the previous step. If changes are made, the indirect people leader should record and initial them in the comment box.
    - Best practice is for the indirect people leader, to instead send the review back to the direct people leader and request they input the neccessary changes and re-submit them.

41. Navigate through each section of the review. Once reaching the last page of the review, scroll to the bottom and click **Approve**.

Initiate To Do Task | *People Leader*

42. As the people leader, click **To Do…** task, displayed in *Awaiting Your Action* on the homepage. The To Do serves as a reminder to schedule the face-to-face meeting with your direct report to go over their annual performance review.
43. After completing the To Do… the review will remain with the People Leader.
   a. Conduct the face-to-face review presentation with your direct report.

Acknowledge the Performance Review | *People Leader*

44. As the people leader, click **Manager Evaluation…** task in *Awaiting Your Action*.
45. From the screen titled, **Provide Employee Review Comments**, click **Get Started**
46. On the Summary page, scroll through the read-only view of the probationary performance review.
47. Click **Next**.
48. On the **Acknowledgement** screen, click in **Status** field underneath Manager. Select either:
   • **Acknowledge Review without Comments** OR **Acknowledge Review with Comments**.
      o Record the date the review was presented to the direct report.
49. Click **Acknowledge.**
   • **Note:** Regardless of the selection, the comment box will remain. If you select to *Acknowledge Review without Comments*, ignore the comments. Acknowleging the review is the equivalent of your electronic signature.
50. Click **Submit.**

Acknowledge the Performance Review | *Teammate*

51. As the teammate, click **Manager Evaluation…** task in *Awaiting Your Action*.
52. From the **Provide Employee Review Comments** screen, click **Get Started.**
53. On the **Summary** page, scroll through the read-only view of the probationary performance review.
54. Click **Next**.
55. On the **Acknowledgement** screen, click in th **Status** field. Select either:
   • **Acknowledge Review without Comments** OR **Acknowledge Review with Comments**.
   • **Note:** Regardless of the selection, the comment box will remain. If you select to *Acknowledge Review without Comments*, ignore the comment section. Acknowleging the review is the equivalent of your electronic signature.
56. Click **Submit.**

Success! Event submitted message will pop up signaling the completion the review process.