

Complete a Probationary Performance Review in Workday

Purpose

The objective of this User Guide is to demonstrate and guide users through all steps required for completing a Probationary Performance Review in Workday. The actions below apply to each user involved in the probationary performance review process: *Teammate*, *People Leader (or Talent Partner)*, and *Indirect People Leader*.

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Launch a Probationary Performance Review | *People Leader or Talent Partner*

1. As the people leader or an agency Talent Partner, type **Start Performance Review for Employee** in the search bar.
2. Using the **Employee** field, search for the name of the individual the review is for.
3. With the name displayed in the Employee field, identify the appropriate review template to be assigned: Using the **Review Template** field > click **By Type** > choose **Probationary Reviews** > select the appropriate review title. (*Teammate or People Leader probationary review options*.)
4. Enter the date range the individual is to be reviewed over by using the **Period Start Date** and **Period End Date** fields.
5. Type any applicable notes in the **enter your comment** text box (*Optional*).
6. Click **Submit**.

Complete the Set Content Step | *People Leader*

1. As a people leader, from the homepage, click the **Set Content...** task for your direct report, displayed in *Awaiting your Action* section.
2. Click **Get Started**.
3. On the **Self-Evaluation (Probationary)** 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 (Probationary)** screen.
6. On the **SMART Goals (Probationary)** screen click **Add** > click into the **Add Existing** field > select **By Category** > choose **Probationary Goals**. Select the first goal and confirm the information fills in. Repeat this process until each probationary SMART goal has been added.

NOTE: If SMART goals do not appear when selecting the *Probationary 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. Click Add each time until all goals have been entered in to the review.

Enter the weighting percentages for each SMART goal. Confirm that the weighting percentage total equals **100**.

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7. Click **Next**.
8. Scroll through the review summary.
9. Click **Submit** to move the review forward so the self-evaluation step.

Complete the Self-Review Step | *Teammate*

1. As the teammate user, from the homepage, click the **Self Evaluation...** task, displayed in the *Awaiting Your Actions* area.
2. On the **Complete Self-Evaluation** screen, click **Get Started**.
3. From the **Self-Evaluation (Probationary)** section, scroll to down and answer the five questions.
4. Click **Next** to proceed.
5. On the **Competencies (Probationary)** section, scroll down and fill in the comment box for each competency.
6. Click **Next**.
7. At the **SMART Goals (Probationary)** section, fill in the comment boxes regarding your probationary goals.
8. Click **Next** to proceed.
9. On the **Attachments (Probationary)** section, upload any attachments.
NOTE: The maximum file size is 30 MBs. Fill in corresponding comments boxes.
10. Click **Next**.
11. On the **Overall Rating Summary (Probationary)** section, type any final thoughts in the comments.
12. Click **Next**.
13. Review the read-only version.
14. Click **Submit** to route the review to your direct people leader.

Complete the Manager Evaluation | *People Leader*

1. From the home page, click the **Manager Evaluation...** task in *Awaiting Your Action* section.
2. On the **Complete Manager Evaluation** screen, click **Get Started**.
3. Look over the answers entered by teammate during their Self-Evaluation step. Fill in comment boxes regarding their answers.
4. Click **Next**.
5. Scroll through the **Competencies (Probationary)** 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.
6. Click **Next** and proceed to the **SMART Goals (Probationary)** section.
7. 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 goal section.
8. Click **Next**.
9. On **Attachments (Probationary)** section, 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.
10. Click **Next**.
11. On the **Overall Rating Summary (Probationary)** screen, you will see the overall review rating and rating description displayed for your direct report. Enter any final comments.
12. Click **Next**. Review the read-only view.
13. Click **Submit** to send review to the Indirect People Leader at the next step.

Approve the Performance Review | *Indirect People Leader*

1. As the indirect people leader, from the home page, click the **Manager Evaluation...** task in the *Awaiting Your Action* section.
2. On the **Review Complete Manager Evaluation** screen, click **Get Started**.

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3. 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 necessary changes and re-submit them.
4. Navigate through each section of the review. On the last page, scroll to the bottom and click **Approve**.

Initiate To Do Task | *People Leader*

1. As the people leader, in the Awaiting Your Action section, click the **To Do...** task, reminding you to schedule and conduct the face to face with your direct report.
2. The review task **Manager Evaluation...** task will appear in your *Awaiting Your Action* section.

Acknowledge the Performance Review | *People Leader*

1. As the people leader, click the **Manager Evaluation...** task in the *Awaiting Your Action* section.
2. From the screen titled, **Provide Employee Review Comments**, click **Get Started**.
3. On the Summary page, scroll through the read-only view of the probationary performance review.
4. Click **Next** to proceed.
5. On the **Acknowledgement** screen, click in **Status** field underneath Manager. 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. If you select *Acknowledge*, that is Workday's equivalent of adding your electronic signature.
6. Click **Submit**.

Acknowledge the Performance Review | *Teammate*

1. As the teammate, click the **Manager Evaluation...** task in the *Awaiting Your Action* section.
2. From the **Provide Employee Review Comments** screen, click **Get Started**.
3. On the **Summary** page, scroll through the read-only view of the probationary performance review.
4. Click **Next** to proceed.
5. On the **Acknowledgement** screen, click in **Status** field underneath Manager. 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. If you select *Acknowledge*, that is Workday's equivalent of adding your electronic signature.
6. Click **Submit**.

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