



Complete Evaluations for Managers and Employees



The Complete Evaluations for Managers and Employees tip sheet is for Employees and Managers.

Employee Evaluation Overview

Employee evaluations are an opportunity to provide feedback on employee performance, identify goals for growth, and document development across the employee's career. Workers reflect on progress toward their goals and how their performance during the review period aligns to institutional values and priorities. Managers identify strengths and opportunities for employee development by completing the manager evaluation after the employee has submitted a self-assessment of each element of the review process.

For more information about performance evaluations, see the tip sheets for Accessing Performance Reviews and Completing Performance Reviews.

Completing an Evaluation, for Managers

Managers will receive a notification in Workday once an employee completes and submits their performance self-evaluation.

1. Once the employee has completed the self-assessment, a notification will appear for the manager in Workday to complete the evaluation.
2. From the Workday Inbox, select **Get Started**.
 - A. The manager can review the employee's goals and add new ones if needed. Select **Next**.
 - B. Select a **Proficiency Rating** for each competency and comment as appropriate. Select **Next** after a rating has been entered for each competency.
 - C. Select a **Rating** for the employee for each question and provide appropriate comments or examples. Select **Next** after a rating has been entered for each competency.
 - D. An overall rating of the employee's performance during the period will appear. Select **Next**.
 - E. The manager can review both sets of responses before selecting **Submit**.
3. Once the review is submitted, the manager will receive a notice to set up a meeting to discuss the evaluation with the employee.

NOTE: This part of the process is not associated with specific steps or automated tasks in Workday.

4. Once the meeting has been completed, the manager must come back to the inbox action to complete the task. Select **Submit**, which sends the review to the employee where they can acknowledge and comment on the review.
5. When the employee acknowledges the review, it returns to the manager for acknowledgement and comment.
 - a. Select the review item in the inbox and select **Get Started**.
 - b. The employee has one more opportunity to review ratings and comments. Select **Next**.
 - c. In the **Status** field (required), select **Acknowledge Review** or **Decline to Acknowledge Review**.

This concludes the employee review process unless performance issues are identified through low ratings, or one or both parties decline to acknowledge the review. In such events, HCM partners will review the evaluation and decide on appropriate steps in conjunction with the manager and/or the employee.

Completing an Evaluation, for Employees

1. At the end of the review period, the employees can find their self-evaluation in their inbox. Select the item and then select **Get Started**.

NOTE: At any point during steps a-d, employees can select **Save for Later** to return to the evaluation at another time.

- a. Previous goals will be visible, and employees will select a rating and can add comments as needed. When done assessing goals, select **Next**.
 - b. Employees will rate their progress on other elements of the evaluation such as Competencies and Questions.
 - c. At the end of the evaluation, employees will see an overall rating based on their responses. Select **Next**.
 - d. Employees can review their responses before selecting **Submit** to send the self-review to the evaluation manager.
2. After the manager completes the evaluation and the manager and employee meet, the employee acknowledges the review.
 - a. Select the review item in the inbox and select **Get Started**.
 - b. The employee has one more opportunity to review ratings and comments. Select **Next**.
 - c. In the **Status** field (required), select **Acknowledge Review** or **Decline to Acknowledge Review**.