

Quick Guide for Supervisors: Performance Evaluations in Workday

This guide outlines the essential steps a manager takes during the annual performance evaluation process in Workday.

Phase 1: Setting Content and Goals

1. **Set Content for Annual Evaluation:** You will receive a task to **Set Content for Annual Evaluation**; click 'Get Started'.
2. **Review Responsibilities:** Check the job responsibilities that automatically pull in from the Position Description. Use the 'Add' button to add any additional responsibilities. Click Submit when finished.
3. **Set Goals:** You must **add at least 3 goals**. For each goal, enter the due date as the **end of the fiscal year**. Choose '**In Progress**' as the status. Review the content, then click submit (This sends a task to the employee for their self-evaluation).

Phase 2: Completing the Manager Evaluation

4. **Complete Manager Evaluation:** After the employee submits their self-evaluation, you will receive the task to '**Complete Manager Evaluation**'. Click 'Get Started'.
5. **Rate Responsibilities:** Choose a rating for each responsibility. Click next.
6. **Overall Rating and Attachments:** You have the **option to attach an evaluation document**. After addressing attachments, click next and **choose an overall rating**. Click next.
7. **Schedule Review Discussion:** You will receive a task to **schedule review discussion**. Click Submit.

Phase 3: Final Acknowledgment

8. **Final Acknowledgment:** Once the employee has provided review comments and acknowledged receipt of the evaluation, you will receive the final task to **acknowledge the evaluation**.
9. **Acknowledge and Submit:** You **must acknowledge in the Status box** and click submit to finalize the process.