Completing a Performance Review

This job aid will walk you through the steps of how to create and complete a performance review.

If your agency is using the automated performance Workday functionality, start on Step 4. If you’re not sure, check with your HR Partner.

Step 1: On the Home Screen, click the Team Performance worklet.

Step 2: From the Actions menu, click Start Performance Review.
Step 3: Complete the following fields.

1. In the **Employee** field, select from the drop down menu the employee for whom you are completing the performance review.

2. In the **Review Template** field, select the performance review template you will be using to review this employee.

3. In the **Period Start Date** field, select the start date for the performance review.

4. In the **Period End Date** field, select the end date for the performance review. The start and end dates are the date range you are reviewing the employee for.

5. Click **Submit** and **Done**. The employee receives an Inbox task to start their elements of the review process.

**Note:** Any section with three dots and lines has a drop down with multiple options to select from.

Once the employee completes their self-evaluation, it returns to the manager with an inbox task to complete their review.

Step 4: Click on the **Inbox** icon.
Step 5: Under Actions, look for Manager Evaluation for the employee you are reviewing.

Step 6: The first item will be displayed for the performance review. You can also see the employee’s self-evaluation for each item.

Note: There are several different performance review templates. Depending on which one you are using the rating scale and how many items you need to rate will vary.
Step 7:

1. This is the question or description of what you are rating the employee on.

2. Under *Rating*, select a rating from the scales listed in the drop down.

3. In the text box you can include comments on your rating and observations of the employee’s performance in this area.

4. Scroll down by clicking on the pencil icon in each section, repeating Step 7 until you have completed all sections.

Step 8: You can add performance, team, or developmental goals for the year. To add a goal, click *Add*.
Step 9: Complete the following fields.

1. In the *Use Existing Goal* field, if there are existing goals created select the *Using Existing Goal* check box and information will be populated into the subsequent fields. If not, leave the field blank.
2. In the *Goal* field, type in name of the goal.
3. In the *Description* field, type in a description of the goal.
4. In the *Relates To* field, select the competency the goal relates to.
5. In the *Category* field, select the type of goal (performance, development, or team goal).
6. In the *Due Date* field, select the due date for when the goal needs to be achieved.
7. In the *Status* field, select the current status of the goal (not started, in process, no longer needed, or completed).
Step 9 continued.

8. In the Add Milestone field, select if there are milestones the employee needs to achieve in order to complete the goal.

9. In the Edit Milestone field, if this is an existing goal you can edit any milestones associated with the goal.

10. In the Comment field, add any comments about the goal and the milestones.

11. Press the checkmark icon in the Goals section to save when you’re finished.

Step 10: The screen will show you have added a goal. If you want to add more goals, click Add and repeat Step 9 until you are done adding goals.
Step 11: From your current screen you can take any of the following actions:

1. Click the edit pencil icon at the top right of each item being evaluated if you want to edit your rating or comments.
2. Click **Submit** to send the performance review to your HR Partner.
3. Click **Send Back** to send the performance review back to the employee with an explanation of why you are sending it back to them.
4. Click **Save for Later** if you want to complete the performance review at another time.

Step 12: Click **Done**. After submitting the performance review it will go to your HR Partner who reviews and approves the performance review.

The HR Partner can **Approve** or **Send Back** the performance review to either the manager or the employee. If it is sent back to the employee, it will route to the manager again to review.
Step 13: After the HR Partner approves the performance review, you will receive a task in your inbox to print the performance review and meet with the employee to discuss it. You can take any of the following actions:

1. Click the **Performance Review Printout** link to get a printable version of the performance review.
2. Click **Delete** if you want to delete the performance review.
3. You can enter in comments you have regarding the performance review.
4. Click **Submit** to send the performance review to your employee to acknowledge the performance review has been discussed and completed.
5. Click **Save for Later** if you want to complete the employee discussion at another time.

Step 14: The employee will receive a task in their inbox to acknowledge the discussion of the evaluation. This acknowledgement does not indicate agreement or disagreement with the content. When the employee acknowledges the evaluation the process is completed.