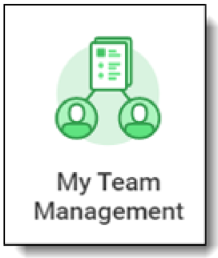
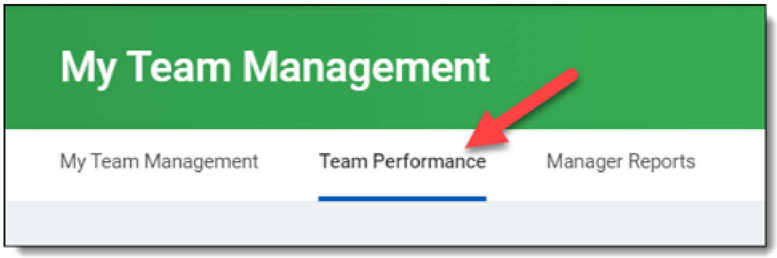
Completing a Performance Review

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

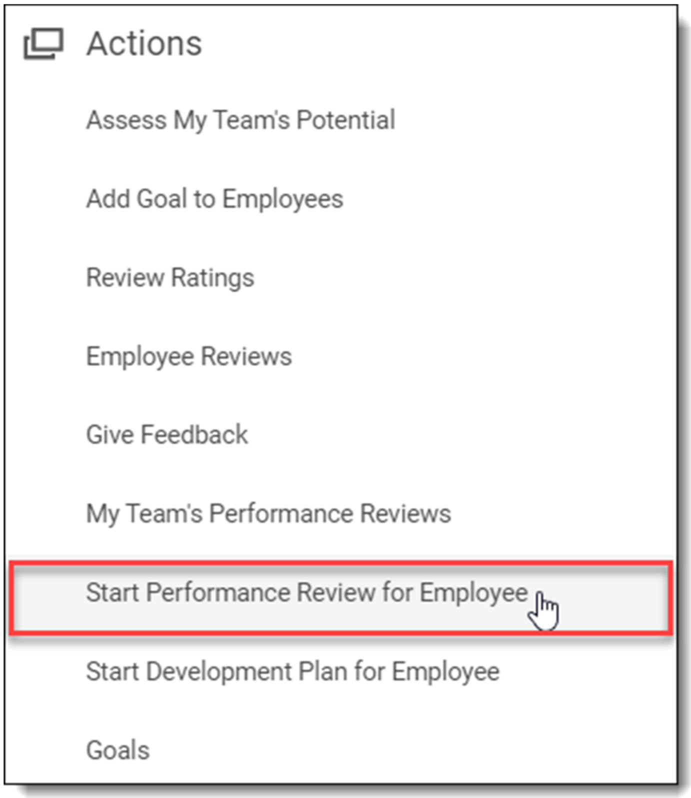
If your agency is using the automated performance Workday functionality, start on Step 4. If you're not sure, check with your HR Partner.

Step 1: On the *Home Screen*, click the **My Team Management** worklet, then click on the Team Performance Tab.



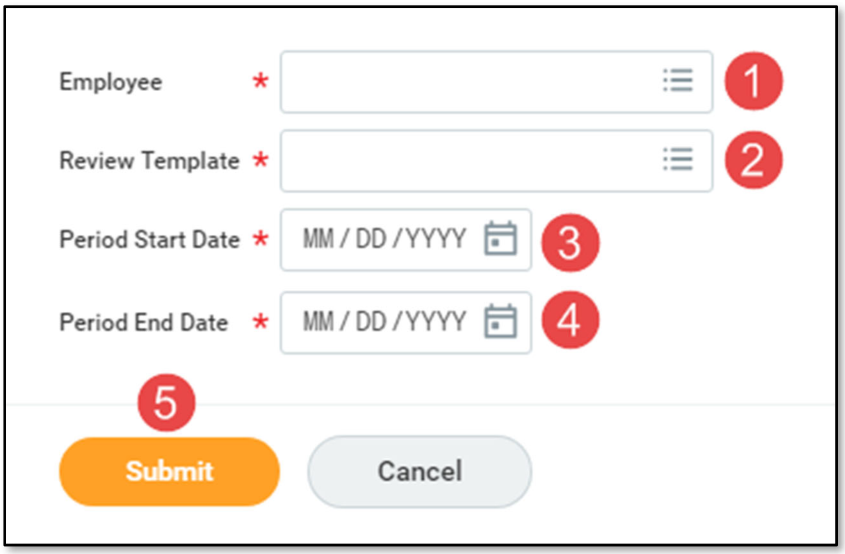


Step 2: From the *Actions* menu, click **Start Performance Review.**



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.

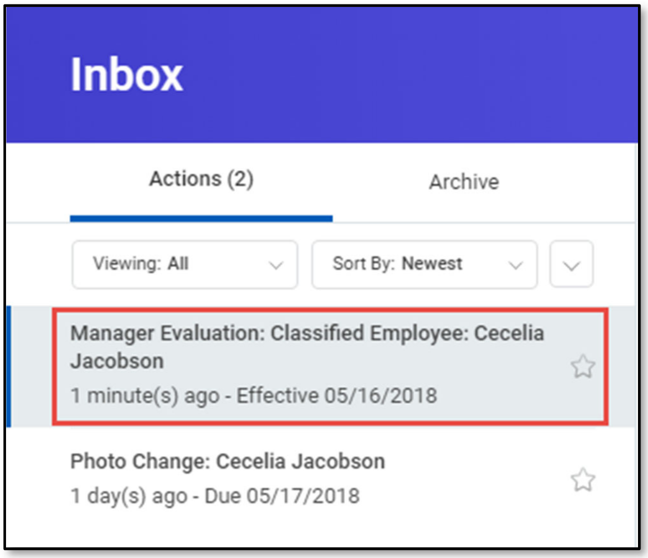


	Note: Any section with three dots and lines has a drop down with multiple options to select from.

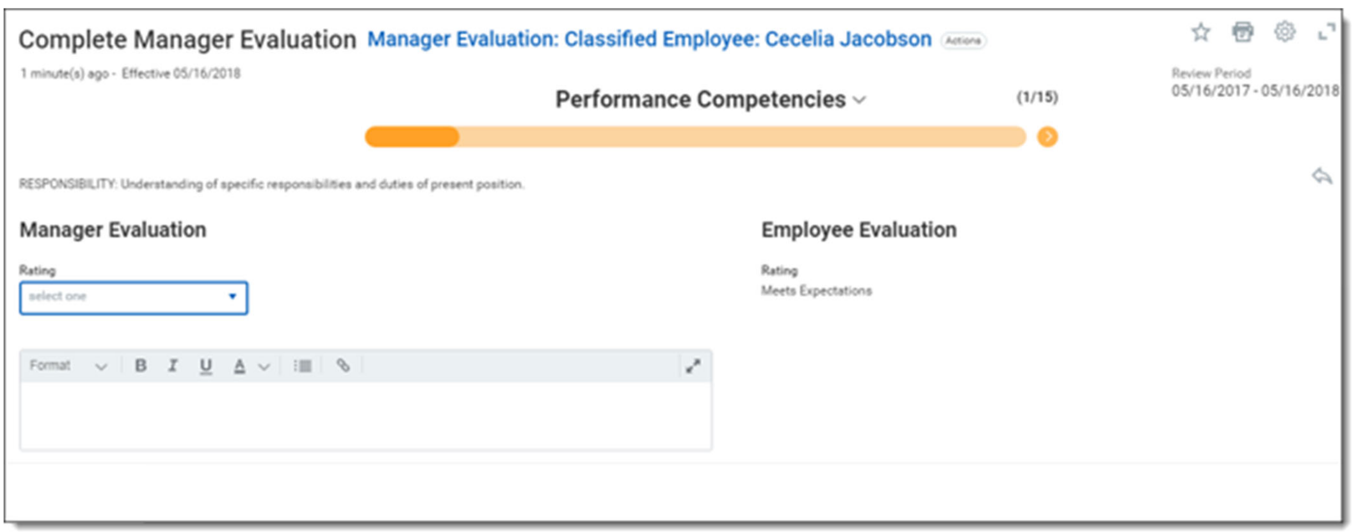
Once the employee completes their self-evaluation, it returns to the manager with an inbox task to complete their review.

Step 4: Click on the **Inbox** icon.

Step 5: Under *Actions*, look for *Manager Evaluation* for the employee you are reviewing.



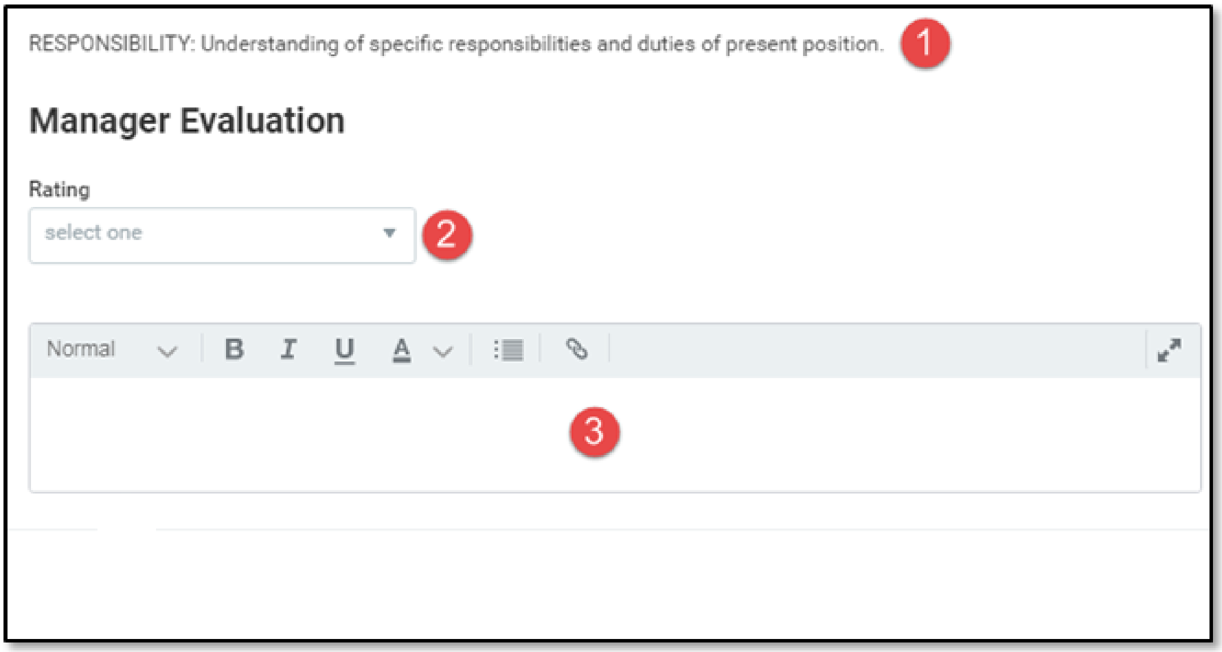
Step 6: The first item will be displayed for the performance review. You can also see the employee's self-evaluation for each item.



	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.**