

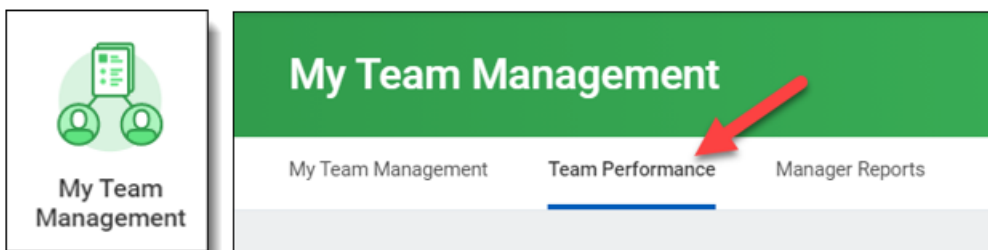
Trial Service Review

This job aid walks through the manager and employee steps of a Performance Review for an employee on Trial Service.

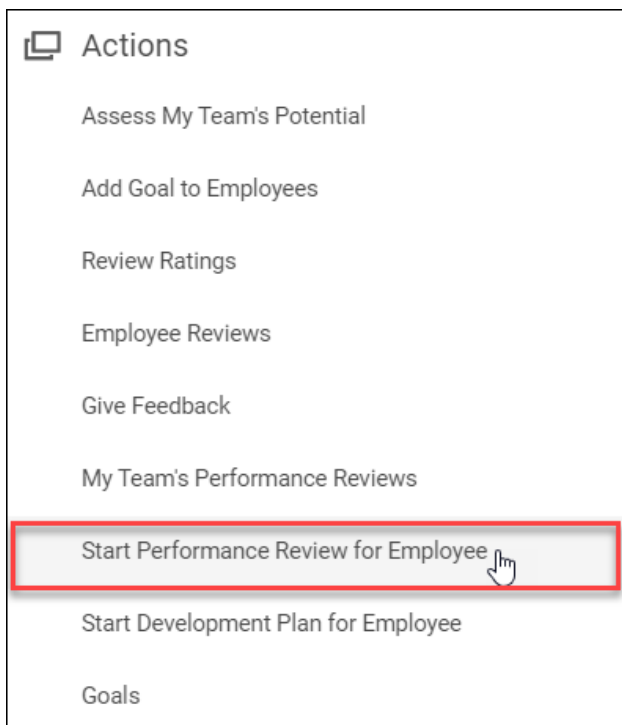


The first thing you want to do is verify the worker has a current probation period. See job aid [Manage Probation Periods \(Trial Service\)](#).

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



Step 2: Click on **Start Performance Review for Employee**.



Step 3: Enter the **Employee** name (1), select the **Review Template** (2), and enter a **Period Start and End Date** (3). Click **Submit**.

Start Performance Review for Employee

Employee * 1

Review Template * 2

Period Start Date * 3

Period End Date * 3

Trial Service Review will be the only review available if the employee is in a probation period.

Step 4: *Up Next* displays the next task is for the manager. Click **Open**.

Up Next

Complete Manager Evaluation

Open

Step 5: Review the instructions.

Review Instructions Guide Me

Trial service is an extension of the selection process and provides the employee the opportunity to demonstrate, by conduct and actual performance of duties, the ability, willingness, and fitness for the position.

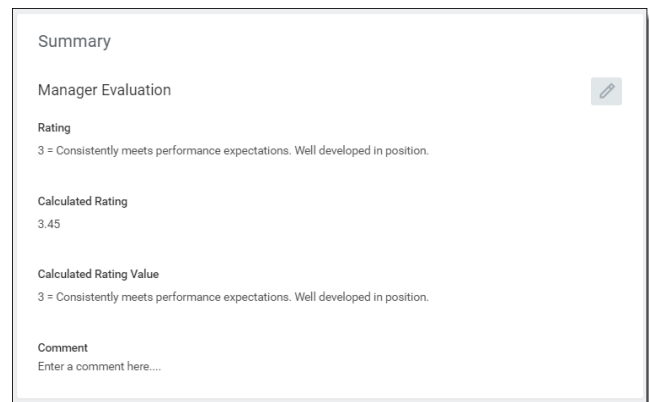
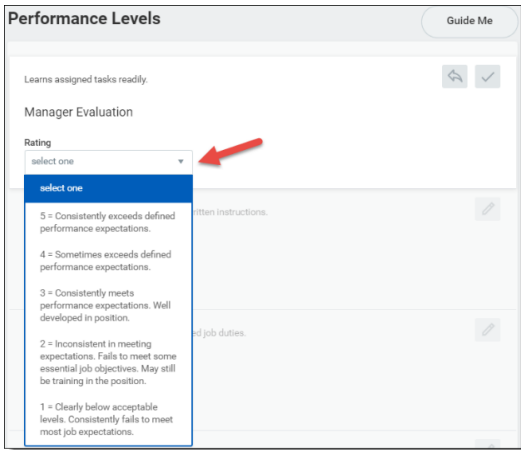
When, in the judgment of the Appointing Authority, performance has been adequate to clearly demonstrate the competence and fitness of the trial service employee, the Appointing authority may at any time appoint the employee to regular status.

Trial service employees may be removed from service when in the judgment of the appointing authority the employee is unable or unwilling to perform the required duties of the position or when habits and dependability do not merit continuance in the service.

For questions about restoration rights to previous classified service or trial service, please refer to SEIU Contract, Article 49 and DAS HRSD Policy 40.065.01 or contact HR.

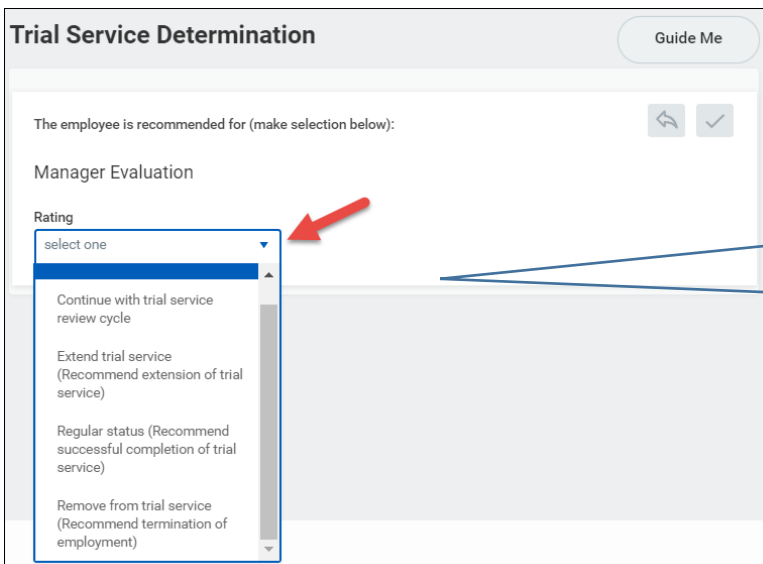
Please include specific reasons in the Manager Comments section if the employee exceeds or fails to meet expectations

Step 6: Click on the pencil icon in each of the sections to edit them. Once in the field, click on the down arrow in the *Rating* box to select the appropriate rating for the employee’s performance. After completing each section, click the check mark to save.



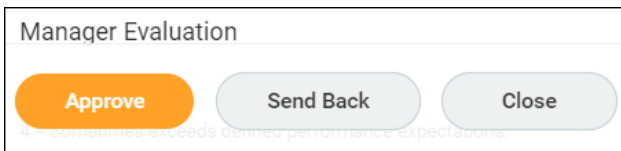
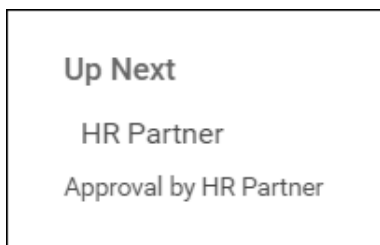
Step 7: Click into the *Summary* section to enter a *Comment*.

Step 8: Review the *Overall Score* and make a *Trial Service Determination*. Click on the pencil icon in the *Trial Service Determination* section. Once in the field, click on the down arrow in the Rating box to select the recommendation. Click **Submit**.



This determination does nothing automatically, but alerts the HR Partner at the next step what the manager wants to happen. An HR Partner will need to make any changes to the employee status recommended.

Step 9: *Up Next* the HR Partner will receive an Inbox task to *Review the Trial Service Evaluation*. There are options to *Approve*, *Send Back*, or *Close*. Closing the task leaves the task in their inbox to review later.



Step 10: The Manager will then receive an inbox task to print the performance review and have an in-person conversation with the employee. Click on the **PDF link**.

Complete To Do **Employee Review Discussion** Actions

1 hour(s) ago - Effective 04/04/2019

For [Falon Partlow](#)

Overall Process [Trial Service Evaluation Review: Falon Partlow](#)

Overall Status In Progress

Instructions This review should be discussed with the employee.
After this discussion, submit this To Do to remove it from your inbox and make it available to the employee and others in Workday.

1 item

File Name	Type	File	Created by	Date and Time Created	
Performance Review Printout 2019-04-01_09_05 PDT.pdf	Business Form (PDF)	🔍	Bobby Rabb	04/01/2019 09:05 AM	Delete

enter your comment

Step 11: The link will bring you to the evaluation. You can view the pages by using the side arrows.

Trial Service Evaluation Review

Manager: [Redacted] - SR18 - Non Exempt Organization: [Redacted]
 Location: [Redacted] Evaluated By: [Redacted] 03/04/2019 - 04/04/2019

Overall Score

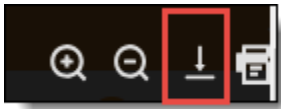
Manager Overall Evaluation

Calculated Rating: 3.45
 Rating: _____

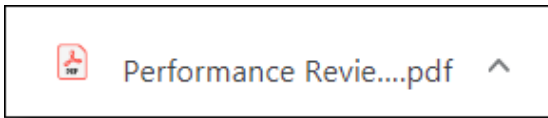
Review Instructions

Trial service is an extension of the selection process and provides the employee the opportunity to demonstrate, by conduct and actual performance of duties, the ability, willingness, and fitness for the position.

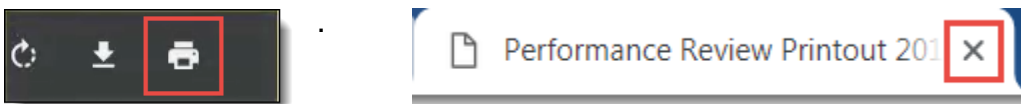
Step 12: When you're ready to print, click on the **Download** icon in the upper right corner of the screen.



Step 13: Click on the message at the bottom of your screen.

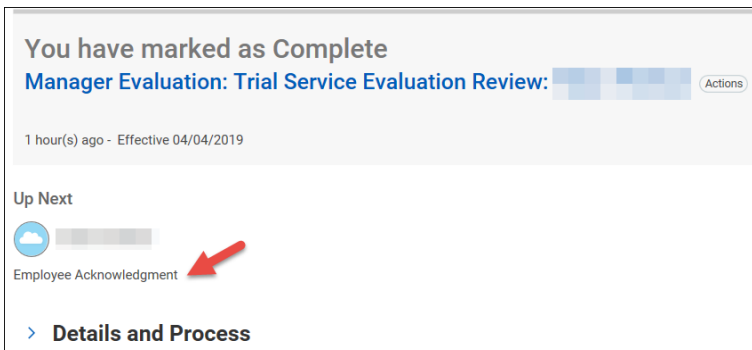


Step 14: Click the **Print** icon in the upper right corner of the screen, and close the tab. Click on the **X**

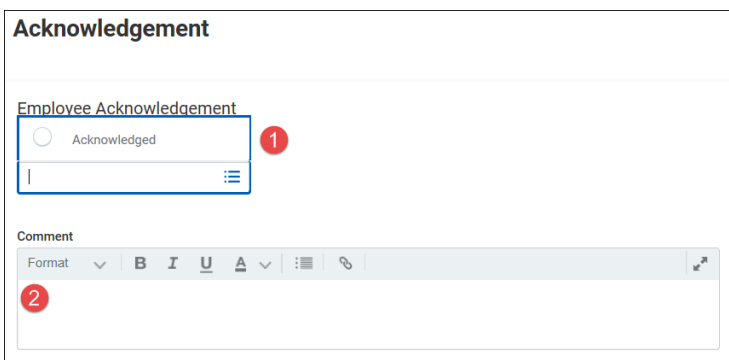


Step 15: Click anywhere off of the evaluation to return to your inbox. When the in-person review is complete, go back into the inbox item and click **Submit**.

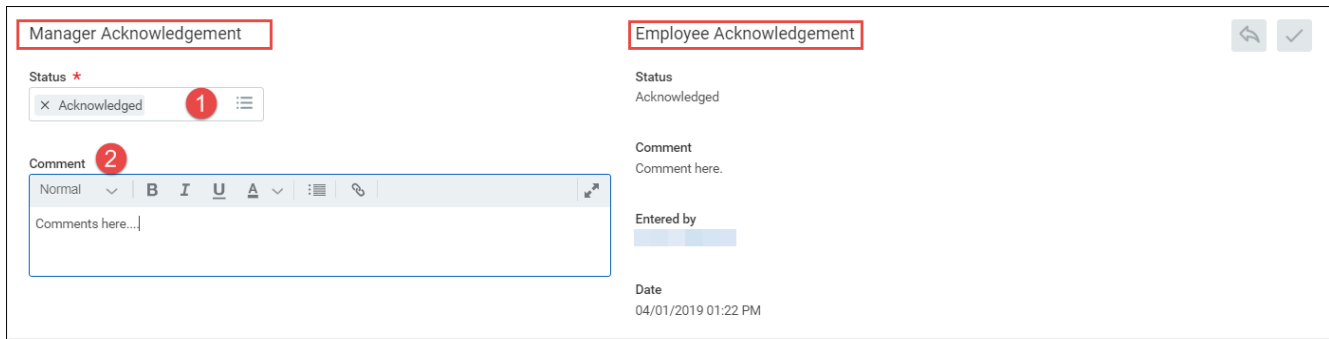
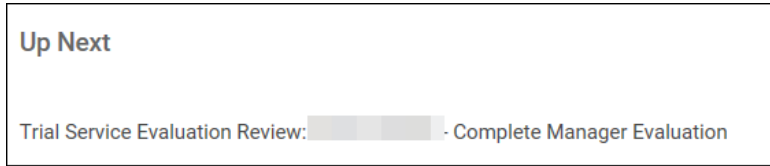
Step 16: *Up Next* the employee will have an inbox task to complete the *Employee Acknowledgement*.



Step 17: The employee will navigate to their inbox task. Click on the pencil icon to edit. Click in the **Status field** and click on **Acknowledged** (1), and enter a **Comment** if you choose to (2). Click **Submit**.



Step 18: *Up Next* the manager will have an Inbox task to complete the *Manager Acknowledgement*. The manager will navigate to their inbox task. They can review the employee acknowledgement and comments if any were added. Click on the pencil icon to edit. Click in the **Status field** and click on **Acknowledged** (1), and enter a Comment (2) if you'd like. Click **Submit**.



The screenshot displays the "Manager Acknowledgement" form. On the left, the "Status" field is set to "Acknowledged" (1), and the "Comment" field (2) contains a text area with a rich text editor toolbar. On the right, the "Employee Acknowledgement" section shows the status as "Acknowledged", a "Comment" field with the placeholder "Comment here.", and the "Entered by" field. The "Date" is listed as "04/01/2019 01:22 PM". A green checkmark icon is visible in the top right corner of the form.

The green check mark signifies the task is complete.

