How to Complete Your Performance Review

The purpose of this job aid is to help associates complete the performance review form in Workday. This process is also available via Workday mobile, however, the navigation steps will vary slightly. For assistance with content, there are Tools and Resources on Workday HQ.

Steps

1. You will complete the self-evaluation task first; your primary manager will complete their review second. Log into Workday, click on your **Inbox** and select your self-evaluation task.

2. Provide responses to the questions.

3. Click **Submit** to complete the review; then your manager will receive a notification to complete their section.

Quick Tips and Troubleshooting

- To reference prior reviews as you complete the current review:
    1. Open a second Workday tab in your browser to pull up the prior review and toggle between tabs; or
    2. Open workday tabs in different browser windows and adjust the size to have them side by side; or
    3. If you have dual monitors, you can have multiple Workday tabs open – one on each monitor.
- If you need to edit your completed evaluation, contact your manager and ask them to send it back to you.
- Expand the task by clicking the *toggle full screen viewing mode* icon.
- Click the *edit* icon   to **enter or modify text**; to **expand** the text field click the *maximize* icon.
- Click the *save* icon   to ensure you do not lose your work if you are interrupted or worried about timing out.
- You can adjust the **font** (size, color, bold, italics, underline and bullets) in the answer field.

View or Print a Completed Review

1. Click your worker profile icon (top right corner) and click View Profile

2. Click the **Performance** section from the list under your name

3. From the Performance Reviews tab, select the **View** button to view it within Workday or click the **Create New PDF** button for a printable document (it will take a brief moment for Workday to generate the PDF). If you select the **View** button and view it in Workday, there will be a printer icon you can click to generate a printable PDF from that screen. (Note: If you create a PDF before your manager submits their section you will need to create a new PDF after it is submitted, so that their comments display on the review.

Self-Initiate Starting Your Review

1. Click your worker profile icon (top right corner) and click **View Profile**

2. Click the **Performance** Section from the list under your name

3. Select the **Start My Performance Review** button

4. In the Review Template field select the **Performance Review** and then select the appropriate template from the available list. Once selected, the dates will auto populate.

5. Click **Submit** to begin. The rest of the steps will match those in the above section.