


DRAFT Job Aid | Preparing for performance review conversations


The purpose of this job aid is to describe how to complete the associate review.

How to complete the associate review section

1. Log into Workday and click on the INBOX worklet and select your review task
2. From the task, select Guided Tour or Summary Editor:
 - Guided Tour: will walk you through each step, it will show you help text and you will have a summary page at the end
 - Summary Editor: all of the information will be on one page and you can complete the entire review on one screen. At any time you can switch to the guided tour by clicking the GUIDE ME button
3. There are two questions for you to answer. Be both specific and concise.
 - Specific: describe behaviors and competencies in your answers. If you need help using the Core Competencies, go to Appendix A.
 - Concise: 200-300 words are recommended, but any length is permitted
4. Click SUBMIT to complete the review
5. Once you click submit, your manager will complete his or her review and schedule a meeting to have the performance review conversation.


Note: In each section, click the Edit  icon to enter or modify information. This process is also available via Workday mobile, however, the navigation steps will vary slightly from how it is listed below.

View Completed Quarterly Performance Reviews:

1. Click your name/photo in the top right corner of Workday and click View Profile
1. Navigate to your profile and click the ACTIONS button 
2. Select TALENT from the drop down and then select View Employee Reviews
3. From the Employee Review screen, select View to view within Workday or click Create New PDF for a printable document

Start Review Earlier than the Scheduled Timeline:

In the event that associates or managers are unavailable during scheduled times, below are steps to start reviews early:

1. Click your name/photo in the top right corner of Workday and click View Profile
2. Navigate to your profile and click the ACTIONS button 
3. Select TALENT from the drop down and then select Start My Performance Review
4. In the Review Template field select "Quarterly Performance Review" and then select the appropriate year/quarter template from the available list
5. Once selected, the dates will auto populate
6. Click SUBMIT to begin. The rest of the steps will match those in the above section

