The purpose of this job aid is to help managers complete the performance review 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.

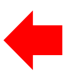
Steps

1. Associates complete the self-evaluation task first; once their portion is completed, the primary manager **receives a notification** from Workday.
2. Log into Workday, click on your **INBOX** and select the task for the associate you wish to review.
3. Read the associate's self-review. There are Manager Evaluation sections for each of the Quarterly Questions with a text field to make comments on what the associate wrote. *(Optional – to reinforce or correct)*
4. **Select the rating** that best matches the associate's performance that quarter. *(Required)*
   - If you select "Struggling", a notification will be sent to your HR Business Partner.
5. In the comment box, provide a brief written **explanation of the rating** you selected. *(Required)*
6. Click **SUBMIT** to complete the review. *Upon clicking submit, the process is complete and the associate is sent a notification to alert them that their review is available.* If you prefer to have the 1:1 prior to this notification:
   - Option 1: Click **Save for Later** and return to Workday to click submit after your 1:1. **Note:** Your printed PDF will **not** include your Rating or Comments until the review is submitted.
   - Option 2: Just prior to your 1:1 meeting, click **SUBMIT** so you can print the entire review, which includes your ratings and comments. **Note:** Since the notification is sent to associates as soon as you click submit, there is a chance your comments may be seen prior to your 1:1.

- If desired, **print the PDF** of the completed performance review to take to the meeting. Steps are on page 2 of this Job Aid for generating **all PDFs for a team** or printing **individual PDFs**.

Quick Tips & Troubleshooting

VIEW PRIOR REVIEWS: to reference the prior quarter's completed review as you complete the current one:
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

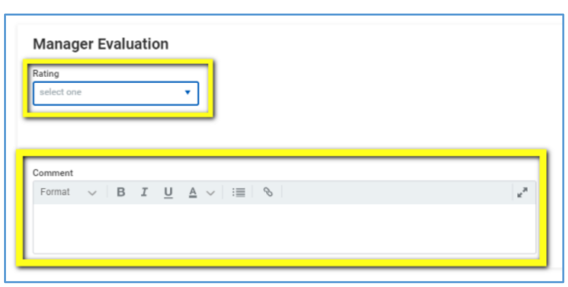


If you need the associate to edit their completed evaluation click the **Send Back** button.
Type a Reason and click Submit. After the associate modifies their answers, it will come back to you.

If your **review is not submitting,** click "View All" on the **red error bar** at the top of the screen, read the error message and correct the error.

Note: One of the more common errors managers encounter happens when either the rating or the comment section is left blank. **Both** of these fields must be completed in order to submit the performance review.

The below image shows the two Workday sections required by managers:



Quick Tips & Troubleshooting (*continued)*

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.

Eligible Associates: All regular associates who are active on the last day of the previous quarter. Excludes Interns, Temps, Contingent Workers, On-Calls. HFIT CS&E excludes associates under 20 scheduled weekly hours.

Team Performance Dashboard - Monitor Progress and Print Team Reviews in Bulk

1. Click on the TEAM PERFORMANCE worklet on the Workday home page
2. Graphs show the process status and rating summary for your direct reports
   - Additional graphs show the process status and rating summary for your entire organization (with subordinate organizations). If you do not manage managers, these additional graphs will not be different
   - Blue text is drillable and can be expanded for a detailed report view
3. Actions and Reports sections of the dashboard include helpful shortcuts to applicable actions and reports
   - Select “My Team’s Performance Reviews” from the Reports menu to manage **In Progress** reviews or view a chart showing the ratings for **Complete** reviews:
     - In Progress: if an associate has not completed their self-evaluation yet, and you would like to pull it forward to complete your section, click the **COMPLETE ON BEHALF OF** button
     - In Progress: if an associate has completed their portion and revisions are needed, click **SEND BACK**
   - Select “Print Employee Reviews” from the Actions menu to **Print Team Reviews in Bulk:**
     - In the Organizations box, select My Organizations & then select your team
       - To select a subordinate team, click Organizations & then select the desired team
       - Or, type in the last name of the supervisor for the desired team, and select from the delivered list
     - In the Review Template box, select Templates in Use and pick the current quarter
       - Or, select Review Type, then Performance Review, then Quarterly Performance Review, then select the appropriate year/quarter template from the available list
     - Click OK & Workday will show you how many reviews it is generating; **click OK again**
     - Workday will show you the status of the PDF generation, click Refresh to update the percent complete
     - Upon completion of the process, navigate to your W: Drive to access all of the generated PDFs. (The W: Drive is found by clicking your name/picture in the top right corner of Workday)

View or Print an Individual’s Completed Review (from this Quarter or Previous Quarters):

1. Navigate to the associate’s profile
2. Click the PERFORMANCE Section from the list under their 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 as well
   - **Note:** The manager section is at the top of the PDF but is found at the bottom when viewing inside Workday.