OVERVIEW:
The Performance Appraisal process has several components:
- The Employee completes the Self Evaluation in Workday.
- The Manager reviews the Employee’s Self Evaluation and completes the Performance Appraisal.
- The Employee and Manager meet to discuss the Performance Appraisal.
- The Employee acknowledges the Performance Appraisal in Workday, adding additional comments if desired.

NOTE: If you prefer, you can create your appraisal comments in Word and then cut and paste them into Workday.

Manager Evaluation PROCESS:

1. From the Workday Inbox, open the Complete Manager Evaluation task.

2. Follow the Instructions on the page.

3. Select the Guided Editor (for specific instructions).

4. Select the Performance Appraisal Guidelines document for detailed information about the process.
5. Select **Next**.

**Major Responsibilities:**
6. Use the **Edit icon** to add your comments to your employee’s input on Major Responsibilities during this year (7/1 – 6/30).

7. Scroll down and place the cursor in the **Comments** field to enter information.
NOTE: If you prefer, you can create your appraisal comments in Word and then cut and paste them into Workday.

8. Select Add to enter additional responsibilities.

9. Select Next.

NOTE: If you are unable to complete the Manager Evaluation in one session, you can save it and continue later.

Performance Areas (Competencies):

10. Indicate a rating for each Performance Area (Competency). For the full definition of each rating, please refer to the Performance Appraisal Guidelines.
Manager Evaluation, cont.

11. Click in the Performance Area or use the Edit icon to enter a rating and comments for each section.

12. Use the scroll bar to move to each Performance Area before selecting Next. (You must enter a rating and comments for each Performance Area to complete the Manager Evaluation.)

13. Select Next.

**Goals for the Current Year:**

14. Use the Edit icon to add your comments to your employee’s input on Goals and Objectives for the Current Year (7/1 – 6/30).

15. Modify the Status for each Goal, as needed. (You will see the employee’s input on the Status of the Goal. You can modify the status if you choose.)

16. Select Add to enter additional goals.

17. Select Next.

**Goals for Next Year:**

18. Use the Edit icon to modify the Goals and Objectives for Next Year.

19. Enter a description of the goal.
20. Add a **Due Date**, if desired.

21. Select **Add** to enter additional goals.

22. Select **Next**

**Overall Comments:**
23. Enter **Overall Comments** about the employee’s performance during this year.

24. The **Overall Rating** will automatically calculate based on the Performance Area ratings provided by the Manager.
25. Select **Next** to move to the **Summary page** to review your input.

26. Select **Submit** to send the evaluation to Human Resources.

If you receive an **error message**, review the wording of the error. Use the **Summary page** to ensure that you have a Rating and Comment in each Performance Area and an Overall Comment. **Submit**.

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**NEXT STEPS:**

- The Performance Appraisal will be sent to Human Resources for review.
- You will receive a task in your Workday Inbox to review the Performance Appraisal with your employee.
- Once you have met with the employee, **Submit** the task.
- The employee will receive a task in their Workday Inbox to acknowledge the Performance Appraisal. At that time, they can add additional comments, if desired.
- If additional comments are added, you will receive a notification from Workday. You will be able to see the comments by going to the employee profile and selecting the Performance tab.