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.

Self Evaluation PROCESS:

1. From the Workday Inbox, open the **Complete Self Evaluation** task.

2. Follow the **Instructions** on the page.

3. Select either the Guided Editor (for specific instructions) or the Summary Editor.

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

**Major Responsibilities:**

6. Use the **Add** button to list your Major Responsibilities during this year (7/1 – 6/30).

7. Scroll down and place the cursor in the **Responsibilities** field to enter information.
8. Add Comments if desired.

9. Select Next.

**NOTE:** If you are unable to complete the Self 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.
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 for each Performance Area to complete the Self Evaluation.)

13. Select **Next**.

**Goals for the Current Year:**

14. Select the **Add** button to begin.
15. Enter the name of this current year’s Goal (7/1 – 6/30).

16. Enter a description of the goal and accomplishments you achieved.

17. Provide a Status rating for each Goal.

18. Select Add to enter additional goals.

19. Select Next.

Goals for Next Year:
20. Enter the name of next year’s Goal.

21. Enter a description of the goal.
22. Select **Add** to enter another goal. (You and your manager will review and finalize these together. No Due Date or Status is required at this point.)

23. Select **Next**

**Overall Comments:**
24. Enter **Overall Comments** about your performance during this year. (Your Overall Rating will automatically calculate based on your Performance Area ratings when your manager reviews your Self evaluation. You will not see the overall rating in the Self Evaluation view.)
25. The **Summary page** allows you to review your input.

26. Select **Submit** to send your Self Evaluation to your Manager.

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

Once submitted to your manager, no changes can be made. If you need to modify your input, ask your manager to “**Send Back**” you Self Evaluation.

-----------------------------

**NEXT STEPS:**

- The Self Evaluation will be sent to your Manager so that (s)he can complete your Performance Appraisal.
- The Performance Appraisal will be sent to Human Resources for review.
- Your manager will meet with you to discuss the Performance Appraisal.
- You will receive a task in your Workday Inbox to **acknowledge the Performance Appraisal**.
• Select the **Status** from the menu.
• At that time, you can add additional comments, if desired.  
  **(This step must be completed to finalize the Performance Appraisal.)**
• If additional comments are added, your manager will receive a notification from Workday.
• You will be able to see the Performance Appraisal by going to your profile and selecting the Performance tab.