

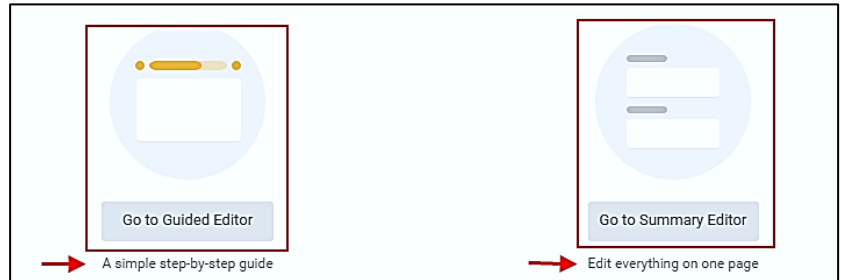
## Completing Annual Appraisals in Workday

*Annual appraisals in Workday may be edited and printed before and after discussing the appraisal with the employee.*

### Manager

1. When review routes to manager, from the Inbox, select desired view:

- Guided Editor
- Summary Editor



**Note:** Images below are from the Guided Editor

2. An evaluation of **each** Core Assessment is required and comments should be added (if using the Competency-Based form)

- Click and rate each competency
- Click the **pencil** icon to add text for each competency and also the section summary
- Click **Next** to move through the appraisal form (Guided Editor)

The screenshot shows the 'Core Assessments' section of the Workday appraisal form. It includes a progress bar at the top, a section for 'Check the rating that most closely represents your overall assessment of the employee's performance', and three rating options: 'Requires Improvement', 'Effective', and 'Exceptional'. Below these are sections for 'Competency', 'Job Knowledge', 'Description', 'Manager Evaluation', 'Manager Rating', and 'Comment'. A red arrow points to the pencil icon next to the 'Job Knowledge' competency.

3. An evaluation of **each** Managerial Assessment competency is required and comments should be added

- Select the **Not Applicable** rating for those who do not supervise staff
- Click the **pencil** icon to add text for each competency and also the section summary
- Click **Next** to move through the appraisal form (Guided Editor)

4. **Add** to address Achievement of Goals if you have set formal goals you wish to evaluate

- Discuss all goals that were set during this performance cycle. When evaluating, please address goals that were added, modified, or changed during the appraisal year
- *Manager Evaluation for this section is not required*

5. Enter the Overall Performance Rating and add comments



Click **Save for Later**

- Although the form will route to a secondary reviewer who may suggest revisions, this is your opportunity to review the draft appraisal with your manager, department head, HR consultant
- You may make changes only until you click **Submit**
- Once the form is submitted, it is considered the final version. You will no longer be able to edit, and the form will route to the next reviewer

**Note:** You must submit the appraisal form and receive it back from the secondary reviewer in Workday before you share or discuss the appraisal with the employee

- To print the form, enter **View Printable Employee Review** in the search bar and enter the employee's name
- Click the print icon
- A *pdf* version of the appraisal will be generated; check your Notifications (under the cloud on the upper right side) and print the form

6. Use your printed copy to guide a performance discussion with the employee

7. **Submit** the form again to route the Annual Performance Appraisal to the staff member

- After you share and discuss the printed appraisal with the employee, the employee may enter comments
- The employee may use the Employee Acknowledgement to document any agreed upon revisions to your delivered appraisal following your discussion with the employee

8. Complete the Manager Acknowledgement

- You will receive a Manager Acknowledgement task only if the employee has added comments
- Review any comments entered in the Employee Acknowledgement
- You may also use the Manager Acknowledgement to document any revisions to your delivered appraisal following your discussion with the employee

9. Human Resources will finalize the form

- Upon completion, you or the employee may view and print the appraisal form
- Completed appraisals are accessed from the Performance tab on the worker profile