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)

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