

Completing Annual Appraisals in Workday

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

Manager Role

1. The Competency-Based Annual Evaluation form will be sent directly to your Workday inbox. If you wish to use the Narrative Form, please contact the person designated as your department's Performance Partner, or your HR Consultant
2. An evaluation of each **Core Assessment** on the Competency-based form is required, and comments should be added

- Click and rate each competency
- Click the pencil icon to open and add text for each competency
- Complete the section summary rating

Core Assessments

Check the rating that most closely represents your overall assessment of the employee's performance. Comments in support of each rating are recommended. If performance in a competency requires improvement or is exceptional, comments are required.

Requires Improvement: Demonstrates satisfactory performance in some areas; however does not perform or meet expectations consistently. Employee needs to acquire and/or develop necessary skills and build/sustain acceptable standard of performance.

Effective: Consistently meets requirements of the position. At times employee may exceed expectations. Overall, employee makes solid, reliable and meaningful contributions to the department.

Exceptional: Delivers exceptional results in performance against goals and core functions. Demonstrates innovation and initiative in all aspects of the position. Excellent work is widely recognized and positively and significantly impacts department/University operations.

Competency
Job Knowledge

Category
Annual, Probationary

Description
Possesses and continually updates requisite knowledge and understanding of assigned duties, responsibilities, policies, procedures and compliance requirements to perform the position. Demonstrates technical skills required for the position. Understands business needs and desired outcomes.

Manager Evaluation

Manager Rating
(empt)

3. An evaluation of each **Managerial Assessment** competency is required, and comments should be added
 - Select **Not Applicable** as the rating for those who do not supervise other staff
 - Click the pencil icon to open and add text for each competency
4. Click **Achievement of Goals and Add** to address Achievement of Goals
 - Discuss all goals that were set during this performance cycle. When evaluating please address goals that were added, modified or changed
 - Click the back arrow if you open this section but do not wish to complete it
 - *Manager Evaluation for this section is not required*
5. Enter the Overall Performance Rating and add comments and click the **Save for Later** button



- This is your opportunity to review your draft appraisal with your manager, department head, HR consultant and make changes
- Use the printer icon to generate a pdf version to print a copy for yourself and/or to share
- You may still 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 (your Performance Partner) in Workday before you share or discuss the appraisal with the employee

Overall Performance Rating

Manager Evaluation

Rating
(empt)

Submit Save for Later Close

6. Use your printed copy to guide a performance discussion with the employee
7. Click **Submit** to route the Annual Performance Appraisal to the staff member for Acknowledgement
 - After the employee receives the appraisal in Workday, they must **Acknowledge** receipt and may enter comments
 - The employee may use the Employee Acknowledgement to add their own comments, or to document any agreed upon revisions to your delivered appraisal following your discussion with the employee

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

Completing and Accessing the Form

- Employee acknowledgement is required (and manager acknowledgement may be necessary) to complete the review