

Employee Evaluations Beg-Year

STEP BY STEP GUIDE

This step by step guide will walk you through the process of creating an employee performance review at the beginning of the year.

Employee Evaluation Workday Workflow

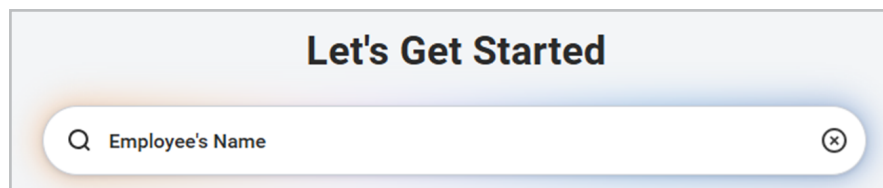
JANUARY

1. **Supervisor** – Initiates & Builds Evaluation (no scoring yet)
2. **Employee** – Reviews & Approves (no scoring yet)
3. **Manager** – Reviews & Approves (no scoring)
4. **HR** – Reviews & Approves

STEP 1: Initiate Performance Review

(Only When HR [Does Not](#) Initiate)

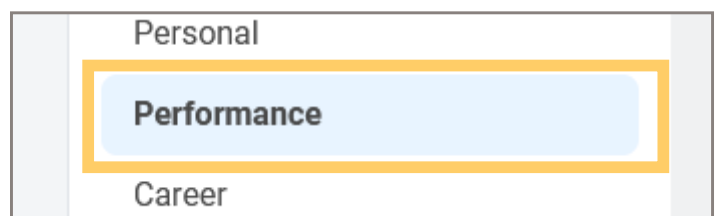
- 1) Search the **employee's name** in the search bar.



Let's Get Started

Q Employee's Name

- 2) Click on **Performance** on the side bar.

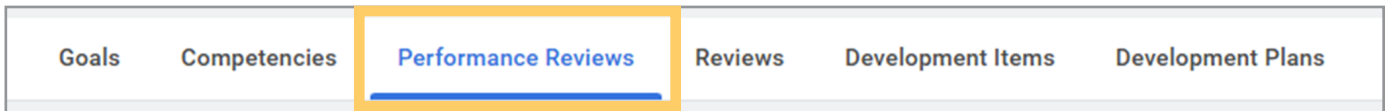


Personal

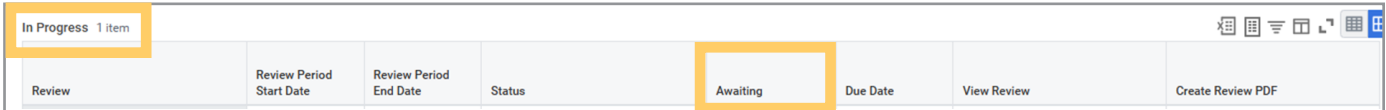
Performance

Career

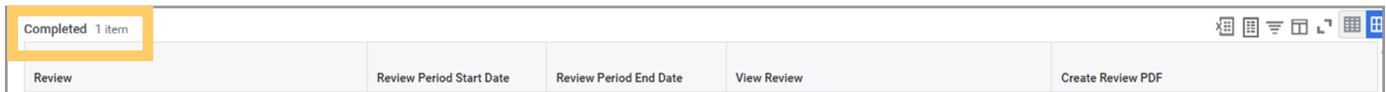
3) Click on the Performance Reviews tab.



This will tell you the status of the Evaluation (In Progress or Completed). If the status is **In Progress**, it will show you who is 'Awaiting' to move it forward.



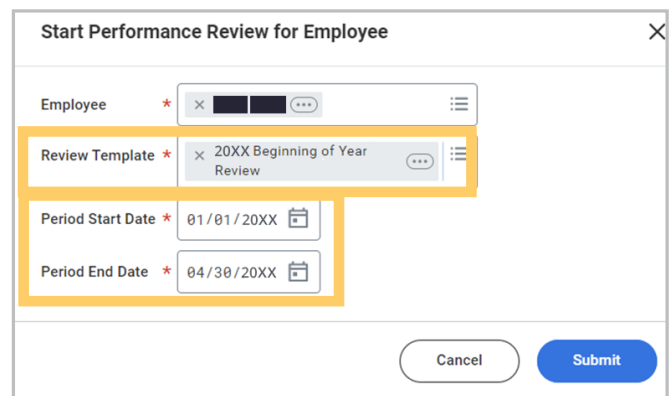
Once it is in the **Completed** section, it is written in stone. No further steps need to be taken, and you cannot delete or cancel it.



4) At the bottom of the page, click the Start Performance Review button.



5) Review Template → 20XX Beg-Year.



6) Period Dates → January 1 - April 30

Dates for new hires:

Employee's start date to April 30

STEP 2: Build Performance Review

1) Start Performance Review Confirmation.

2) Select Guided Editor or Summary Editor (your choice)

- **Guided Editor** → Shows only each section as you go.
- **Summary Editor** → Shows all sections on an entire page.



It does not matter which one you chose, and you can go back and forth as it is the same form. **Just be sure to save your changes.**

STEP 3: Responsibilities (50% of Overall Rating)

Next, you will add responsibilities with the weighting for each one.

The weight must add up to 100%.

- If you know what the essential functions are for this position, please add those first with a higher level of weight.
- Next, add additional functions.
- ✳ All employees are required to have a Time & Leave Management responsibility (weighting of 5).
- ✳ All Leads, Supervisors, and Managers will have an additional Time & Leave Management responsibility for their direct reports (weighting of 5).

WORKDAY TIP #1:

Once completed, Workday will sort the responsibilities in alphabetical order, so if you wish to have them in a specific order, be sure to add a number in front of each one.

WORKDAY TIP #2:

SMART is an acronym you can use to guide you in writing responsibilities for your employees.

Specific
Measurable
Achievable
Relevant
Timed

Find more information on SMART goals on the [Intranet](#).



Responsibilities

Guide Me

Responsibility *	✕	✎
1 Essential Function(s) -		
Weighting		
20		
Responsibility *	✕	✎
2 Essential Function(s) -		
Weighting		
20		
Responsibility *	✕	✎
3 Essential Function(s) or Additional Function(s) -		
Weighting		
20		
Responsibility *	✕	✎
4 Additional Function(s) -		
Weighting		
15		
Responsibility *	✕	✎
5 Additional Function(s) -		
Weighting		
15		
Responsibility *	✕	✎
6 Time & Leave Management -		
Weighting		
10		

Add

Examples of Time & Leave Management:

- Consistently arrives on time and ready to work.
- Provides ample notice when needing time off (comp or annual leave only).

STEP 4: Goals

In this section, you may include goals for the employee that makes sense for their position and level they are currently holding.

HR recommends at least one professional development course, training, or project that:

- Relates to the employee's current position.
- Relates to a similar position within the division.
- Encourages general professional development.

Goals Guide Me

Goal * ✕ □ ✎
Goal 1 - Professional Development / Training - specific to position (ex: expanding KSA's, customer service, etc.)

Supports

Due Date

Status

Track By

Goal * ✕ □ ✎
Goal 2 - Professional Development/Training - general (ex: cross training, leadership, etc.)

Supports

Due Date

Status

Track By

Goal * ✕ □ ✎
Project 1 - (ex: process improvement, participate on a team or committee, assigned a specific project, etc.)

Supports

Due Date

Status

Track By

Add

STEP 5: Competencies (50% of Overall Rating)

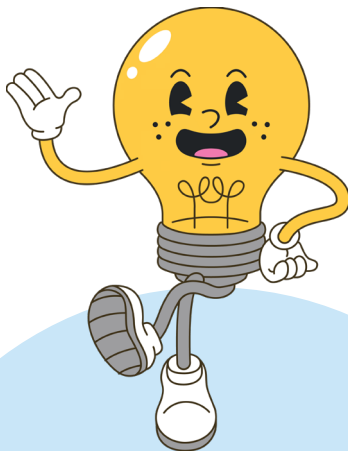
Example shown is the Individual Contributor.

Next, you will enter the weight of each competency. The descriptions of the competencies are tied to the management level of the job family and may not be changed. The weight must add up to 100%.

Once you are done, click **Submit**. The Employee Evaluation will go to the Employee to review and approve.

The Employee Evaluation will then go to the Supervisor, then the Manager, and finally HR to review and approve.

Find more information on the [Intranet](#).



Competencies		Guide Me
Competency		
Communication		
Description	Writes, presents, and interprets information in a clear, concise, and organized manner. Considers the audience when composing or crafting a message. Uses technology effectively to deliver information. Promotes and exhibits transparency through timely communication of important issues.	
Weighting	0	
Competency		
Continuous Learning		
Description	Embraces an ongoing commitment to formal and informal learning and self-improvement. Takes initiative to seek out personal and career development.	
Weighting	0	
Competency		
Customer Service		
Description	Consistently demonstrates interest in customers and anticipates their needs, then responds to the customers' needs in a timely manner.	
Weighting	0	
Competency		
Interpersonal Relationships		
Description	Builds constructive working relationships that are characterized by a high level of trust, cooperation, and mutual respect.	
Weighting	0	
Competency		
Prioritization		
Description	Sets priorities and goals and designs or uses tracking systems or timetables to achieve those goals.	
Weighting	0	
Competency		
Problem Solving		
Description	Maintains a solution-focused mindset to gather information, identify key issues and collaborate with others to identify solutions.	
Weighting	0	