

Employee Evaluations Year-End

STEP BY STEP GUIDE

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

Employee Evaluation Workday Workflow

AUGUST - SEPTEMBER

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

OCTOBER

4. **Employee** – Overall Self Evaluation & Rating

DECEMBER

5. **Supervisor** – Overall Employee Evaluation & Rating
6. **Manager** – Reviews Overall Employee Evaluation & Rating
7. **HR** – Reviews & Approves
8. **Supervisor** – Schedule One-on-One Meeting & Discuss Overall Rating
 - a) Click **Submit** once meeting is scheduled.
9. **Employee** – Acknowledgment that One-on-One Meeting was held
10. **Supervisor** – Acknowledgment that One-on-One Meeting was held

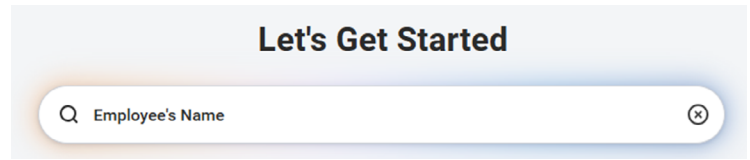
STEP 1

AUGUST - SEPTEMBER

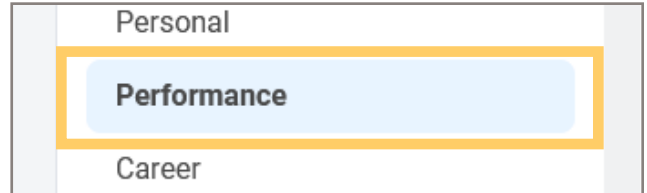
Initiate Performance Review

(Only When HR Does Not Initiate)

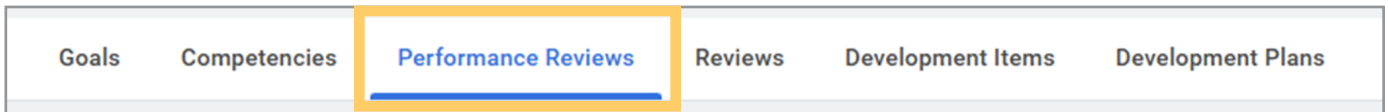
- 1) Search the **employee's name** in the search bar.



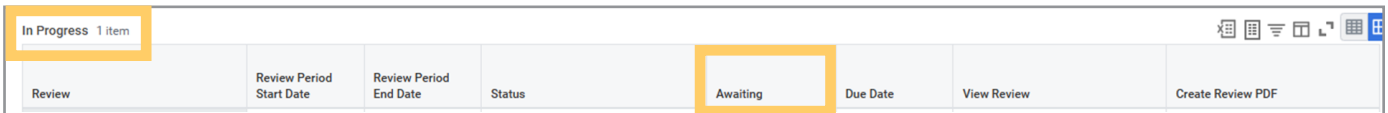
- 2) Click on **Performance** on the side bar.



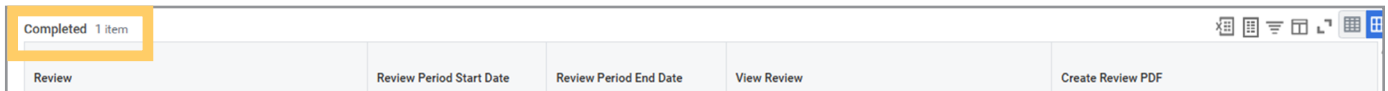
- 3) Click on the **Performance Reviews** tab.



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.

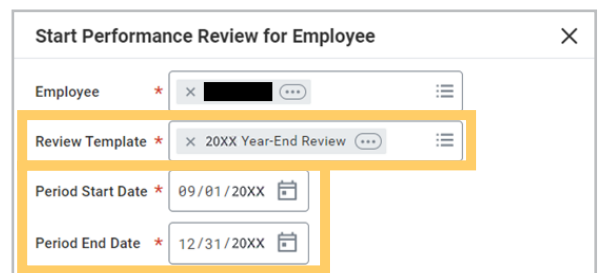


- 5) **Review Template** → **20XX Year-End**.

- 6) **Period Dates** → **September 1 - December 31**

Dates for new hires:

Employee's start date to December 31



Note: Employees who have less than 90 days of service at Service Oklahoma should not receive an Year-End Evaluation.

STEP 2: Rating Responsibilities & Competencies

- 1) Use the **Rating Scales** located on the Intranet to review each section and provide a rating and comments.

After you have completed rating each **Responsibility** and **Competency**, Workday will auto-calculate the final score at the bottom.

The image shows two adjacent form fields. The left field is labeled 'Rating *' and contains a dropdown menu with the following options: 'select one', 'Achieved Outstanding Results', 'Achieved More Than Expected Results', 'Achieved Expected Results', 'Partially Achieved Expected Results', 'Expected Results Not Achieved', and 'Not Rated'. The right field is labeled 'Comment *' and contains a rich text editor with a 'Format' dropdown, bold (B), italic (I), underline (U), text color (A), and list (bulleted) icons, and a text input area.

- 2) Once you click **Submit**, the Evaluation will go to the next level of management for approval.

Additional Task – Assess Potential

Potential

- **Current Role** - The employee demonstrates an ability to perform work in their current role or a similar role at the same organizational level.
- **Level Up** - The employee demonstrates an ability to perform work in their current role and shows personal initiative and potential to progress into the next level of their job or step in their career ladder.
- **Multi-Level Up** - The employee demonstrates an ability to perform work in their current role and shows personal initiative and potential to progress beyond the next level of their job or step in their career ladder.

The image shows a dropdown menu for the 'Potential' field. The menu is open, showing the following options: 'Current Role', 'select one', 'Current Role', 'Level Up', 'Multi-Level Up', and 'N/A'. The 'Current Role' option is highlighted in blue.

Retention: The rating indicates the perceived likelihood this employee is actively seeking other opportunities.

- **Loss Impact:** The rating indicates the perceived level of disruption to operations within your team if this employee were to leave the organization.

The image shows a dropdown menu for the 'Retention' field. The menu is open, showing the following options: 'select one', 'select one', 'High Flight Risk', 'Medium Flight Risk', and 'Low Flight Risk'. The first 'select one' option is highlighted in blue.

The image shows a dropdown menu for the 'Loss Impact' field. The menu is open, showing the following options: 'select one', 'select one', 'Immediate', 'High', 'Medium', and 'Low'. The first 'select one' option is highlighted in blue.