

# **Completing Your Employee Review with the New Workday Tool**

## **Employee Guide**

**Effective March 2014**

Welcome to the annual Performance Management Process.

One major change which will occur this year is the implementation of our performance review tool within Workday. This will be a significant change for both managers and employees.

As you know, this is a great opportunity to reflect on the past year, engage in discussions with your manager on your professional development and career goals and plan for next year. We made significant changes to the staff review process last year, including the introduction of competencies, increased emphasis on professional development and excite, engage and empowering our employees. This year, we have made slight changes to the tool and timeline based on feedback during our cycle last year.

Our objectives in implementing this process within Workday include:

- Leveraging “new age” technology
- Opportunities for increased feedback throughout the year
- Elimination of paper and word files
- Business process workflow for approvals
- Enhanced reporting and visibility of employee performance and development needs
- Increased visibility to goals linking to our 2020 plan
- Limited mobile review capability
- Additional future Performance Management/Talent features

This handout will walk you through the steps to complete your self-evaluation.

The Performance Evaluation in Workday has the follow sections:

Performance Goals  
Job Responsibilities  
Competencies  
Current Development Needs  
Excite, Engage, Empower  
Additional Comments  
Overall Rating

There is a “hints” portion at the end of each section as well as at the end of this document that will assist you in completing the evaluation.

If you have any questions during the process please feel free to reach out to Human Resources & Organizational Development at 802-651-5800.

The system will launch a self-evaluation for all employees and send an e-mail with the below message:

Please log into the Workday system to complete this action.

Business Process: Self Evaluation: 2013/2014 Staff Performance Evaluation  
Subject: 2013/2014 Staff Performance Evaluation: [redacted] Clark

The self-evaluation will appear as a task in your Workday inbox (top right of your homepage).



When you open your inbox, click on the Self Evaluation 2013/2014 task and then click the Full Screen Mode button.

### Inbox



Choose the Go to Guided Editor button to complete your self-evaluation.

### PERFORMANCE EVALUATION – 2013/2014

This gives you and your manager an opportunity to participate in your performance evaluation process by documenting the many ways you have contributed to departmental goals and/or goals of Champlain College. You will use this template to describe your job performance. Please use the Guided Editor and complete each section. After completion please click "Submit" on the final summary page and this will be sent to your supervisor.



After you have launched the self-evaluation, you will see the different sections listed at the top.

## Performance Goals:

These are the goals that were established at the beginning of the evaluation cycle, typically at the start of the fiscal year. Both manager and employee should meet and agree on SMART goals, priorities, development needs, action plans and expected results. You can add as many goals as you have (typically ranges from 3-7). These would be the goals established for the 2013/2014 year (July 2013 – June 2014).

### Workday Instructions:

- To start click on the plus (+) sign. Please enter the below information for each goal you had established at the beginning of the year and any goal that was added throughout the year.
- Goal - Name of goal
- Description - Details of the goal using the SMART model (Specific, Measurable, Achievable, Realistic, and Time Bound)
- Category - Type of goal - Individual (goal specific to your job only), Departmental (goal specific to only your department), Institutional (goal specific to the entire organization)
- Supports - Select a goal from the 2020 Strategic Plan which your goal supports (if applicable) - you will need to click Champlain College (Dave Finney), 07/01/2013 to 06/30/2014, and then one of the appropriate five goals.
- Due Date - When the goal was or will be completed
- Status - Completion status
- Rating - How you feel you did or are doing on the goal
- Comment - Please describe your contributions, results achieved, progress and other details to support your rating.

Please include the priority of each goal in the description area. If the goal was unplanned (UFO) please add as a new goal and identify this as unplanned in the description area.

The Summary will give you the average rating from this section only. This piece will be included to determine your default overall rating on the second to last section.

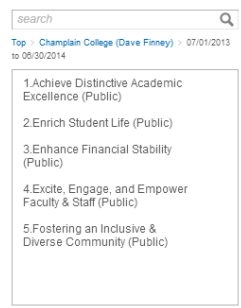
Please complete all sections indicated with a red arrow. You may also want to complete the comments section if additional information is needed.

The screenshot shows the 'Performance Goals' form in Workday. Red arrows point to the following fields:

- Goal**: The top text input field.
- Description**: The second text input field.
- Category**: A dropdown menu with a search icon.
- Supports**: A dropdown menu with a search icon.
- Due Date**: A date picker field.
- Status**: A dropdown menu.
- Employee Evaluation**: A section header for the rating and comment fields.
- Rating**: A dropdown menu with a search icon.
- Comment**: A large text input field at the bottom.

Performance Goals instructions continued on next page...

In the Supports box, you will need to select one of the 2020 Strategic Plan goals' that your particular goal supports. To do this click Champlain College (Dave Finney), 07/01/2013 to 06/30/2014, and then select the appropriate strategic goal.



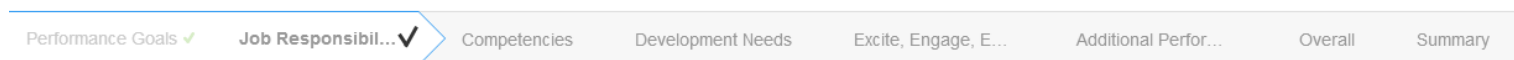
The screenshot shows a search bar with the text "search" and a magnifying glass icon. Below the search bar, there is a breadcrumb trail: "Top > Champlain College (Dave Finney) > 07/01/2013 to 06/30/2014". A dropdown menu is open, displaying a list of five strategic goals:

- 1.Achieve Distinctive Academic Excellence (Public)
- 2.Enrich Student Life (Public)
- 3.Enhance Financial Stability (Public)
- 4.Excite, Engage, and Empower Faculty & Staff (Public)
- 5.Fostering an Inclusive & Diverse Community (Public)

### Tips:

- You should only use the “not applicable” as a status for a goal if the goal is not to be rated as part of this performance cycle.
- The category field in the Performance Goals allows you to select multiple values. If there is only one that relates you can click off the small window for it to disappear.
- If you have additional unplanned goals (UFO's) that occurred you will want to add those as an additional goal and indicate they were unplanned in the details area.

### Job Responsibilities:



The screenshot shows a navigation bar with several tabs. The "Job Responsibilities" tab is currently selected and highlighted with a blue border and a checkmark icon. The other tabs are: "Performance Goals" (with a checkmark), "Competencies", "Development Needs", "Excite, Engage, E...", "Additional Perfor...", "Overall", and "Summary".

Please complete the *Job Responsibilities* portion. This can include your day to day job duties as well as small projects that were not considered goals. You may include any additional comments pertaining to your job responsibilities as well.

### Workday Instructions:

- Click the Plus sign (+) and enter your job responsibilities and any additional comments necessary.
- Job Responsibilities - Enter your job responsibilities and anything important not indicated in your Performance Goals.
- Rating - How you feel you did throughout the year specific to your job responsibilities
- Comment - Please describe your contributions, results achieved, progress and other details to support the view of your rating.



The screenshot shows the "Job Responsibilities" form section. It has a title "Job Responsibilities" with a red asterisk. Below the title is a large text input area. Underneath this is the "Employee Evaluation" section, which includes a "Rating" field with a "search" button and a dropdown arrow, and a "Comment" field with a large text input area.

### Tips:

- You should summarize job responsibilities in one section (do not use the (+) button multiple times to add different responsibilities).
- The Summary will give you the average rating from this section only. This piece will be included to determine your default overall rating on the second to last section.



### Workday Instructions:

- Click the Plus sign (+) to add a development item.
- Development Item - Name of development item
- Additional Information - Please include the below information: Competency, Skills, Knowledge or Performance Gap

Expected Outcomes

Suggested Training and/or Development Activity

Suggested Time Frames

Support Person

Make sure to click Done after each development item.

- Status - Completion status
- Relates To - Select a specific competency otherwise leave blank (this does not need to be completed)

The screenshot shows a 'Development Item' form in Workday. On the left, a modal window is open with the following fields: 'Add Existing' with an unchecked checkbox, 'Development Item' with a text input field (marked with a red asterisk), and 'Additional Information' with a larger text area (also marked with a red asterisk). A 'Done' button is at the bottom of the modal. Two red arrows are overlaid on the image: one points to the 'Development Item' text field, and the other points to the 'Additional Information' text area. In the background, the main form is partially visible, showing a status dropdown menu set to 'In Progress' and a 'Relates To' field with a search bar.

### Tips:

You will not use the "Add Existing" box.

- You should only use the *Relates To* field on the Development Items section only if you are linking the item to a current competency.
- Use the (+) button to add a new item for each development item you have.

## Excite, Engage, Empower:

To assist in meeting our 2020 strategic plan we ask all staff to comment on our Excite, Engage and Empower (E3) goal.

### Workday Instructions:

- Indicate your comments in the *Answer* section.

**Question**

Identify what would be meaningful to Excite, Engage and Empower you at Champlain College:

**Employee Evaluation**

**Answer**

A

B

I

U

↶

**Additional Performance Evaluation Comments:**

Question	Additional Performance Evaluation Comments.
Employee Evaluation	
Answer	

Please enter any additional comments or information that you would like to include in your performance evaluation.

### Workday Instructions:

- Indicate your comments in the *Answer* section.

Overall:

Your rating will default based upon how you ranked your professional goals. If you wish to change the overall rating you can do so by clicking on the rating, then by checking the box and adding the rating. If you submit as is, it will take the calculated rating.

Workday Instructions:

- Leave rating as is or click “I want to change the Rating”.

performance rating.

Employ

Rating

search

Rating ★

Calculated Rating

0

Default Rating

Done

Description

Tips:

- The Overall page will default based on the ratings of the Performance Goals and Job Responsibilities.
- The system will give you an error if you leave the overall rating empty.



## Summary:

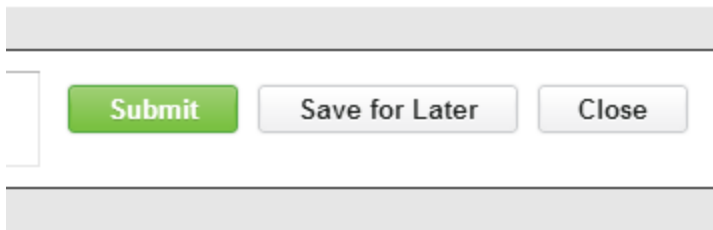
The summary page will allow you to view the completed self-evaluation before you submit it. You are able to change and go back as many time as needed before you submit. You are encouraged to print your self-evaluation if you would like to have a hard copy. To do this click on the print icon on the top right of the summary screen.

### Workday Instructions:

- Indicate your comments in the *Answer* section.



When you are complete your self-evaluation you will need to click the green submit button. You will not be able to make any changes after you submit.



### Tips:

- You will only see the *Save for Later* button at the end but you can exit and it will save and resume where you left off.
- After you submit you will not be able to change anything on your self-assessment. Please make sure you have completed each section as thoroughly as possible.
- Print the review for your records before submitting.

## Overall Process and Next Steps:

1. Employee completes Self-Evaluation
2. Manager approves Employee Self-Evaluation
3. Manager completes Manager Evaluation on employee
4. Manager's manager approves Manager Evaluation
5. Manager provides Manager Review Comments (releases Manager Evaluation to employee)
6. Employee provides final Employee Review Comments (receipt of Manager Evaluation)

After the employee completes the Self-Evaluation it will be sent to their manager for approval. A task will appear in the manager Workday Inbox:

The manager will need to review and has the ability to approve if all looks good or send back to the employee with comment on what needs to be updated. If this happens you will need to update and resubmit the self-evaluation.

After the manager reviews and approves the Self-Evaluation another task (Complete Manager Evaluation) will be sent to the manager Workday Inbox. The manager will complete the Manager Evaluation.


After the Manager completes the Manager Evaluation it will be sent up one more management level for approval.

After approved by second level manager another task will be sent back to the manager (Provide manager Review Comments) for final comments and to release the manager review to the employee. After the manager completes this step it will send the final manager evaluation to the employee for final comments.



The final step will be for the employee to acknowledge provide final review comments.

### Workday Instructions:

- Click in the Employee Acknowledgment to the right of Employee Feedback
- Click in status and enter the status of Evaluation Complete (employee receipt)
- Enter any comments if needed
- Click the green Submit button at the bottom




**Provide Employee Review Comments**  
**Manager Evaluation: 2013/2014 Staff Performance**  
**Evaluation:** Jackie Green  
Evaluated By: Jackie Green

  
**> 07/01/2013 - 06/30/2014**  
Review Period



**Acknowledgment**

Employee Feedback

Employee Acknowledgment

Status \* Evaluation Complete (employee) 

Comment

 Undo 

### **Overall Hints (additional tips to help complete your self-evaluation):**

- Older versions Internet Explorer will not display the comments section correctly. Please make sure you have the latest version or use Google Chrome or Firefox to be safe.
- There are additional comment options at the end of some sections – these are intended for overall comments on the entire section.
- You will need to click the grey square in certain fields to get the drop down menu.
- Some fields are multivalued which means you can enter multiple selections.