

## Complete Manager Evaluation: Annual Performance Review

**Prior Step: Employee Self Evaluation.** In Workday, the annual review process starts with **Self Evaluation: Annual Performance Review**. Employees receive a Workday inbox item alerting them to complete their self evaluation.

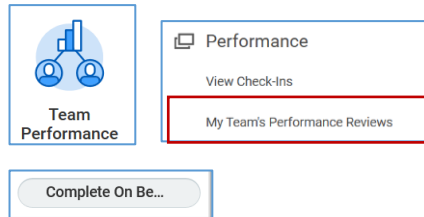
After each employee submits their self-assessment, managers receive Workday inbox items including that employee's Annual Performance Review Template.

### ONLY AS NEEDED: Complete Template on Behalf of

**NOTE:** You will not see employee's Review Template in your inbox until they have submitted their self-evaluation. If self-evaluation has not been submitted by date you need in order to complete manager assessment, you, as manager, have control to move template to your inbox.

To manually advance template:

1. Go to the **Team Performance** worklet on your homepage
2. Select **My Team's Performance Reviews**
3. Find the employee and click the **Complete On Behalf Of** button, and the template will move to your inbox.

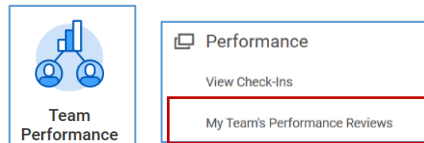


### ONLY AS NEEDED: Manually Send Back Template

There may be situations where reviews need to be sent back to employee to provide more context or complete additional steps in review.

To manually send back template:

1. Go to the **Team Performance** worklet on your homepage
2. Select **My Team's Performance Reviews**
3. Find the employee and click the **Send Back** button, and template will move to employee self evaluation step.



**NOTE:** If managers send back review to employee and have made comments or selected ratings, those comments/ratings are NOT visible by employee.

### Complete Performance Reviews

1. Navigate to Workday Inbox
2. Select **Manager Evaluation: Annual Performance Review** task



#### STEPS IN PROCESS

- Assess Goals

**NOTE:** If employee has received feedback in Workday, a pop-up will appear. This ensures feedback is readily

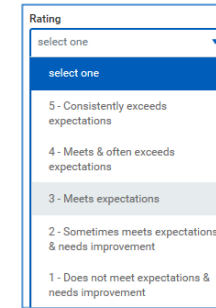
- Assess Competencies
- Review Feedback
- Review Summary & Submit

visible and can be considered when inputting goal and/or competency assessments and feedback.

### Assess Goals

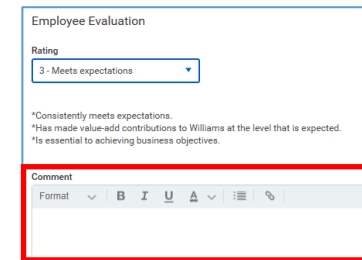
When template opens, employee's goals are listed

1. **Rate each Goal.** Click directly on each goal and:
  - a. Edit any goal components (e.g., status, description, etc.) as needed
  - b. Select Rating that represents performance against that goal thus far



**NOTE:** All goals MUST have rating selected before template can be submitted

2. **Provide Comments.** Document feedback on key accomplishments by either...
  - a. In Comment box



- b. In goal's Activity Stream (click comment box icon in upper right)



3. **Save Edits.**
  - a. by clicking check mark
  - b. or by clicking anywhere on screen outside fields you're editing.
4. Repeat steps 1-3 for each goal in list
5. Click **Next** to move to next section

**NOTE:** Once manager assessment is complete on each employee goal, **Calculated** rating for that section displays, based upon weightings and selected ratings of goals. This Calculated rating is used in Overall rating calculation.



### Assess Competencies

Williams' core competencies are reflected and should be assessed

- Rate each Competency.**
  - Click on first competency, Action oriented.
  - Review employee's self-assessment rating and any comments as consideration into your rating.
  - Review description and select Competency Rating that best represents how employee has demonstrated that competency.
- Provide Comments.**
  - Behavior section provides context regarding what is expected at career ladder/level for selected rating.
  - Provide examples of how employee has demonstrated competency at selected rating level.
  - Examples are especially important if applying a 1 or 5 rating.
- Save Edits.**
  - Click check mark
  - Click anywhere on screen outside fields editing.
- Repeat steps 1-3 for each goal in list
- Click **Next** to move to next section

**NOTE:** All competencies MUST have a rating selected before your template can be submitted.

**NOTE:** If employee is an individual contributor, two sets of behaviors will be presented. Refer to behaviors that corresponds to ladder/level of their current role.

**NOTE:** Once manager assessment is complete on each employee goal, **Calculated** rating for that section displays, based upon weightings and selected ratings of goals. This Calculated rating is used in Overall rating calculation.

### Review Feedback Received

- Received employee feedback in Workday (Get/Give Feedback functionality), appears on this page for review.
- Click number to review any feedback provided by others.
- Click Next to move to next section.

### Review and Submit

Overall page includes multiple rating fields.

### Manually Adjust

(only used in extreme cases)

A rating may need to be manually adjusted in some extreme cases.

- Click on **Rating** drop down field
- Select score that better represents performance.

**NOTE:** Check box under "I want to change Rating" will automatically populate if you override calculated rating score.

Click **Save for Later** to come back later to complete.

**NOTE:** Make sure to come back and **Submit** before process completion deadline to alleviate data loss.

### Summary

- Final page is summary review of goals and competencies along with comments and ratings entered by manager and employee.
- Click Submit when finished entering information

## Hold Step

Once submitted, reviews route to hold step with HR until Executive Officer Team has approved company rating distributions.

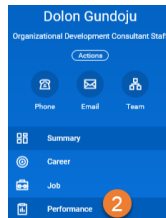
## Facilitate Performance Conversation

When ratings are finalized in early December, managers receive "To Do" inbox item that should only be submitted once performance review conversation is held.

### View Performance Form

Best practice is to facilitate performance conversation from online version of form

1. Navigate to employee profile
2. Click **Performance** in profile menu
3. Click **Performance Reviews**
4. Click **View** (if needed, share screen with employee via teams or conference room hub)
5. Review all sections of form with employee



Feedback Received	Individual Goals	Organization Goals	Performance Reviews	Development Plans	Development Items	Archived Goals
In Progress 1 item						
Reviewer	Criteria Filter Sections	Review Period Start Date	Review Period End Date	Status	Awaiting	
Annual Performance Review 2019: Dolon Gundouj	Yes	01/01/2019	12/31/2019	To Do: Hold until performance meeting has occurred	Brod Church	View

### Complete To-Do Step

6. Navigate to appropriate inbox To-Do item
7. Optional: Enter final comments as needed (tone of review, additional items worth noting, etc).
8. Click **Submit**

### Complete To Do

Hold until performance meeting has occurred

For: Dolon Gundouj

Overall Process: Annual Performance Review 2019: Dolon Gundouj

Overall Status: In Progress

Instructions: It is time to conduct your annual performance review conversation. Do NOT submit until you have completed the review with your employee. Once submitted, your employee can see your feedback comments and will receive a task to acknowledge the review.

enter your comment

Submit Save for Later Close

### TERMINATED EMPLOYEES:

Click **Submit** for all terminated employee inbox items. This removes inbox items.

**IMPORTANT:** Once submitted, full review template is routed to employee for review and electronic acknowledgement. Entire form and all ratings are visible

**NOTE:** Clicking **Submit** digitally time/date stamps review, no need to enter as was required previously)

## Employee

### Acknowledgement Steps

Employees receive inbox item for acknowledgement

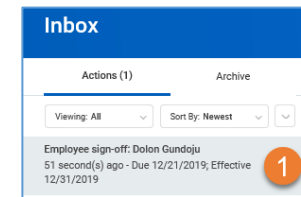
1. Employee clicks **inbox item**
2. Employee selects "I acknowledge" from dropdown
3. Employee adds comments as needed
4. Employee clicks **Submit** to acknowledge receipt of review

Employees navigate Profile > Performance > Performance Reviews to review assessments and comments.

### Manager Sign-off

Once employees acknowledge, reviews route back to managers for sign-off and storage in worker profiles.

1. Managers click **Submit**
2. Process is complete. No further action required



### Provide Employee Review Comments

Manager Evaluation: Annual Performance Review 2019: Dolon Gundouj

Evaluated By: Brod Church

51 second(s) ago - Due 12/21/2019; Effective 12/31/2019

Click the status field below to acknowledge that you have seen the performance review and understand its contents. Your acknowledgement does not imply agreement with the content.

**Acknowledgement**

Employee Acknowledgement

I acknowledge

Comment

Submit Save for Later Close



## NOTES

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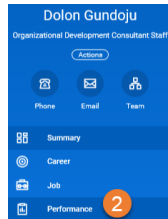


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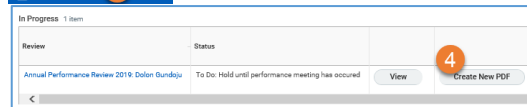
**Print Performance Form**

In rare cases, a printed version of form may be required.

1. Navigate to employee profile
2. Click **Performance** in profile menu
3. Click **Performance Reviews**
4. Click **Create New PDF**



**NOTE:** Employees do NOT sign printed copy of form and best practice assumes not having printed copies of form. It also alleviates audit risks.



NOTE: A "Notify Me Later" notification may appear. Once document becomes available, it is visible in Notification section



**WARNING:** When reviews are printed, overall rating and override information is **NOT** visible at bottom of form. This does not become visible until **AFTER** employee acknowledgement occurs.

**Communicate Overall Rating and/or Override**

- **Option 1:** Verbally communicate overall rating to employee and inform that it will be visible in Workday when sent for final acknowledgement
- **Option 2:** Use print pdf option noted above and screen shot overall rating and override section of form. Print for attachment with other printed form contents.

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**Reorganization Considerations**

- Any managers changing roles on Jan. 4 as result of recent reorganization – including those current managers who are moving into individual contributor roles – **need to complete performance reviews for reports before Jan. 4.**
- Managers who have direct reports who report to new managers on Jan. 4 must also complete those performance reviews before Jan. 4.
- Once employees report to new managers, current managers lose ability to access those employee's performance reviews.
- Managers who are not impacted by any changes with the Jan. 4 reorganization can continue working toward Jan. 10 deadline.

**Steps to Address**

1. Complete performance reviews before Jan. 4 if you are manager moving into new role or if you have directs that will report to new managers.
2. Best practice is to display review real-time to discuss with employee.

**REMINDER:** If you **print** year-end evaluations using directions above, it does **not** display overall rating. Instead, verbally communicate employee's overall rating and inform employee it will be visible when review is sent for acknowledgement.

**WARNING:** IF a manager changed roles and does not complete reviews by Jan. 4, they should request PDF of performance review from new manager or HRBP. Also request a screenshot of overall rating because that will not be included in PDF version of review.

**Additional Reorg Implications**

- **Scenario A:** Manager moves to Individual Contributor role with reorg
- **Scenario B:** Manager moves to lead different group
- Incomplete performance reviews remain in former manager's inbox, regardless of whether manager is now an IC or still in manager role.
- Former manager should finish incomplete reviews.
- After employee submits acknowledgement, review routes to NEW manager to input final sign-off.

**HRBP Notes for Reassign Tasks**

- HRBPs receive Manage BP for Worker to reassign any/all incomplete tasks to new manager.
- Incomplete Performance Reviews are listed at bottom of list.
- We recommend NOT reassigning reviews, but to let them remain with former manager to complete.

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