

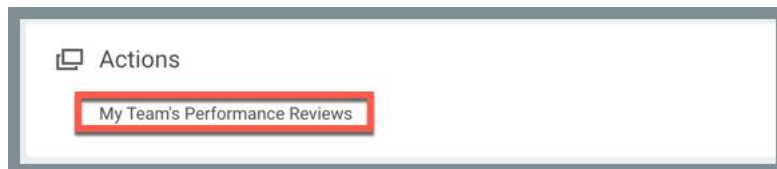
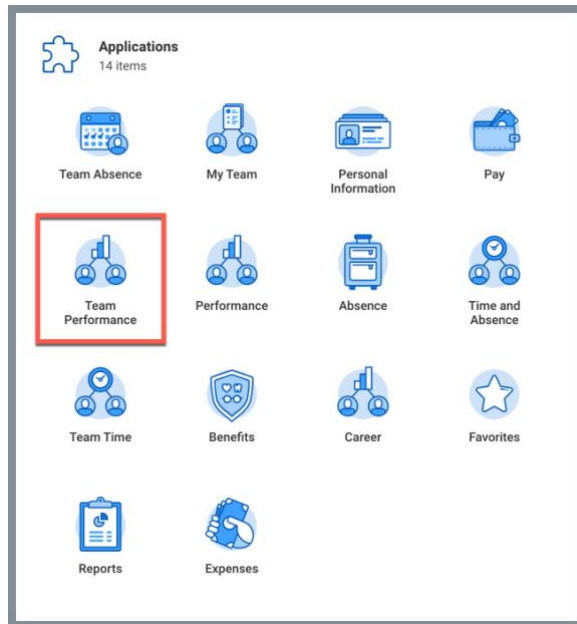
Annual Performance Evaluation: Manager Evaluation of Direct Report(s)

Revised
3/31/2021

1. As a Manager, you will need to complete a performance evaluation for all of your direct reports in addition to your own self-evaluation, via a Workday inbox task(s). You will see a separate task for each direct report.

NAVIGATING TO EVALUATIONS

2. The recommended method to view your performance evaluation items is via the **Team Performance** worklet on your Workday homepage, then selecting **My Team's Performance Reviews**.



3. In this window, you will see the **Annual Performance Reviews** that are 'In Progress' or 'Completed'. The items marked 'In Progress' require your attention.
4. You can determine who has completed their self-evaluation by whether or not the *Complete Self Evaluation – Initiation* link still appears in the Worker's 'Current Step' column.

Notes:

- In the screenshot below the first employee has completed their self-evaluation, while the second employee still has it yet to complete.

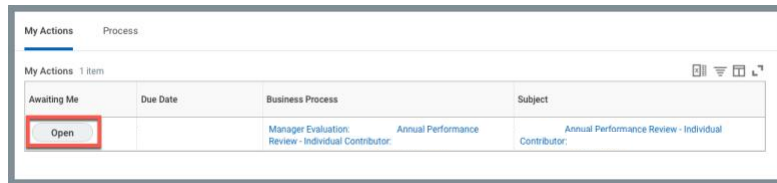
A screenshot of the 'In Progress' performance review table. The table has columns for Worker, Performance Review, Current Step, Manager Rating, Employee Rating, Period Start Date, and Period End Date. Two rows are visible: William Penn and Lucretia Mull. The 'Current Step' column for both rows contains the text 'Complete Manager Evaluation - Initiation' and 'Complete Self Evaluation - Initiation'. A red rectangular box highlights the 'Current Step' column.

| Worker | Performance Review | Current Step | Manager Rating | Employee Rating | Period Start Date | Period End Date |
|---------------|----------------------------------------------------|-----------------------------------------------------------------------------------|----------------|-----------------|-------------------|-----------------|
| William Penn | Annual Performance Review - Individual Contributor | Complete Manager Evaluation - Initiation Complete Self Evaluation - Initiation | | | | |
| Lucretia Mull | Annual Performance Review - Individual Contributor | Complete Manager Evaluation - Initiation Complete Self Evaluation - Initiation | | | | |

- After the employee deadline for self-evaluations has passed, you will be able to submit the manager evaluation even if the self-evaluation has not been completed.

COMPLETING EVALUATIONS

- To begin an evaluation for your direct report(s), which may include a **Manager Evaluation** and/or an **Individual Contributor Evaluation**, select the *Performance Review* link in the Performance Review column for a direct report and choose *Open*.



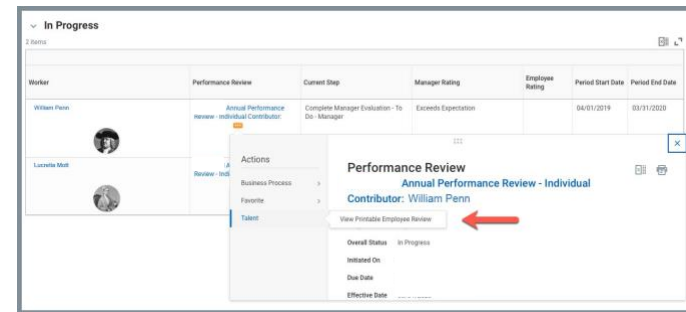
- Follow the instructions provided. Be sure to scroll down and answer all of the questions in each section prior to hitting **Next**.
- Section VII: Overall Performance Rating and Summary** is the overall rating that will be applied to the performance evaluation and selecting a 'Follow Up' option will result in HR reaching out for further instruction.
- After all required sections are completed select **Submit** at the bottom of the page to move to the next step in the process

Notes:

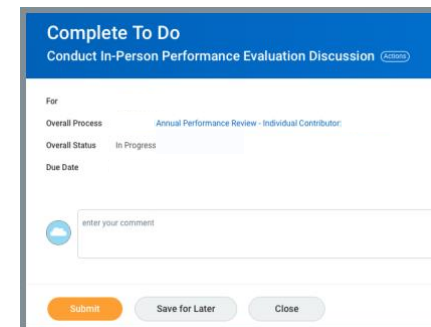
- A red **Error** message will appear if a required section was missed.
- You can **Save for Later** if you need to complete the evaluation at a later time and want to save your progress. Your employee will NOT be able to view your progress until completed.

- After the Manager Evaluation has been completed a 'To-Do' will appear in your inbox to complete an In-Person* Performance Evaluation Discussion with each direct report.

Note: In order to print a completed **Annual Performance Evaluation** for your discussion, navigate back to your **Team Performance** worklet and hover your mouse over the 'Annual Performance Review...' link and select the box with the three dots. Navigate to 'Talent', then select 'View Printable Employee Review'.



- After the in-person* discussion is complete, navigate to your **Team Performance** worklet, select the relevant Performance Evaluation, select 'To-Do', and 'Submit' at the bottom of the window.



11. The final step is for both you as the Manager and your direct report to acknowledge the in-person* discussion was held. Navigate back to the **Team Performance** worklet or view the task in your inbox.

***In-Person:** refers to multiple modes of communication that allow a manager to directly speak with their staff regarding their performance evaluation. This includes using Zoom video conference, telephone calls, and only if comfortable, face-to-face meetings.

Please note if conducting face-to-face meetings, it is important to follow COVID protocols.