Annual Performance Evaluation: Zone/Shift Supervisor Evaluation of Report(s)

1. As a Zone/Shift Supervisor, 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.

   a. To act on your inbox tasks, either select them on your Workday Home Page or select the ‘Inbox’ item in the upper right of your Workday screen.

COMPLETING EVALUATIONS

2. Follow the instructions provided. Be sure to scroll down and answer all of the questions in each section prior to hitting Next.

3. 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.

4. 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.

5. 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 report.

6. After the in-person* discussion is complete, navigate to your Workday Inbox, select the relevant Performance Evaluation, select ‘To-Do’, and ‘Submit’ at the bottom of the window.

7. The final step is for both you as the Zone/Shift Supervisor and your report to acknowledge the in-person* discussion was held. Navigate back to your Workday Inbox to act on the task.

*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.
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VIEWING TO EVALUATION STATUS / VIEW COMPLETED

8. To view the status and/or view completed evaluations for the workers in your Zone/Shift select the search bar at the top of your Workday Home Page and search for the report: Employee Review Summary

9. The report will require you to populate some information prior to running:

   a. Organizations
      i. Either search for your Zone/Shift organization by name or click in the field next to Organizations > select Organizations > and select your Zone/Shift.

   b. Use the image to the right to duplicate the other required report fields:

   c. Select ‘OK’.

   d. The report will return status results of the performance evaluation process for the workers in your Zone/Shift.
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10. To view the reviews in those categories, click on the blue hyperlink number and a window will pop up showing more detail.

11. In Progress reviews are waiting on action by either you as the Zone/Shift Supervisor or the Employee. You can determine who has the next step via the “Awaiting Persons” column.

12. Completed reviews can be reviewed by selecting the Three Dots > Talent > View Printable Employee Review

13. Managers in your department have the ability to view all Performance Evaluations.