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Workday Workshop:

Performance Management
Annual Evaluations & End of Orientation
For **Managers**

Duration: 45 minutes

# Access Workday through the VUMC Network or VPN

To access all the features and functionality of Workday, you must be on a VUMC network – either by being onsite or by using VPN (BIG-IP Edge Client)

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Workshop Agenda

- Review the Evaluation Timeline

- Review Employee Accountabilities

- Request Feedback from another Manager

- Access and complete a Manager Evaluation

- Complete a Manager Acknowledgement

- Review the process of the Performance Evaluation

- Complete an End of Orientation form

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Sample Evaluation Process Timeline
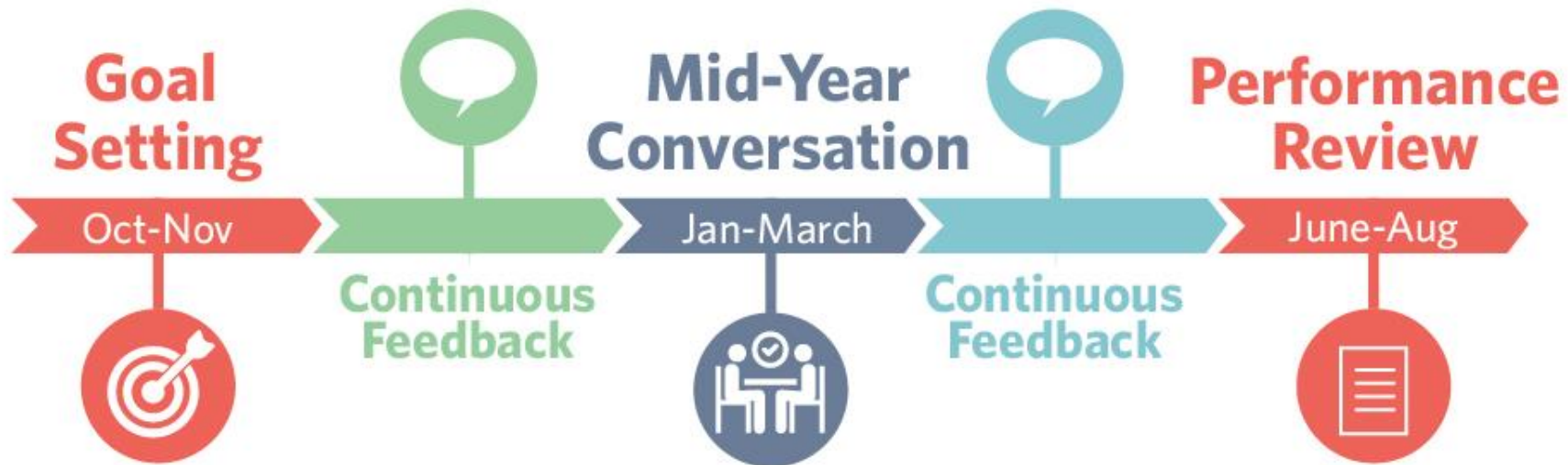
Note: This timeline is subject to change annually.

Sample Evaluation Timeline

Self-evaluations open in Workday

Nurse peer review open in RedCap

Nursing self-evaluation open in RedCap and Workday

Managers begin evaluations in Workday

June 4

July 2

June 1-15

July 1

Aug 31

Leader Peer Assignment Open (not mandatory)

Self-evaluations close

Nursing self-evaluation closes in Redcap and Workday

Nursing peer review closes in RedCap

Evaluations completed and signed by employee and manager in Workday

Note: This timeline is subject to change annually.

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Employee Accountabilities

Employee Accountabilities

Employee will complete the self-evaluation or will opt to skip the evaluation.

After the manager completes and submits the manager evaluation, the employee must review and acknowledge the evaluation from their My Tasks.

Employee must archive goals after the manager and employee have both acknowledged the Annual Performance Evaluation.

Request Feedback

DEMO

Requesting Feedback

Managers should only request feedback from another manager with whom the employee has worked under.

The feedback will not be visible for the employee on the Performance Evaluation. Note, if feedback was received before **July 1**, it will appear on the Manager Evaluation under Feedback when completed.

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Reviewing Feedback in Employee Profile

Contact

Personal

Performance

Career

Feedback

If feedback is received after July 1, you can review the feedback in the employee profile. Select **Feedback** from the menu and then select **View Feedback Received** to review the feedback.
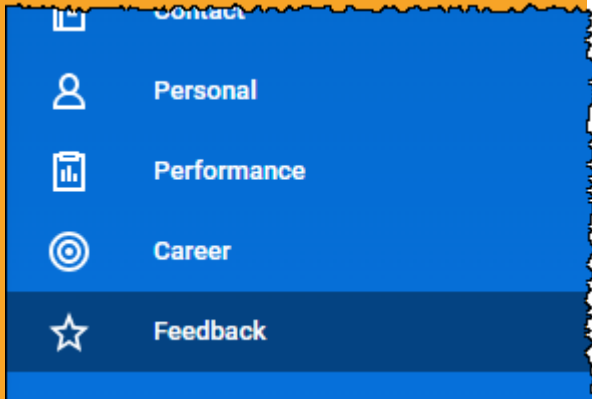
| | Feedback Received | View Feedback Received | Feedback Requested | Feedback on My Team |

3 items

Date	Photo	From	Feedback Received		Type
			Feedback	Badge	
06/12/2024		Anita Knapp	Sample Feedback 1	Bright	Anytime Feedback
06/12/2024		Jack Pott	Sample Feedback 2	Innovative	Anytime Feedback
06/12/2024		Holly Wood	Sample Feedback 3	Teamwork	Anytime Feedback

Complete Manager Evaluation

Button Overview

Back: return to the previous page

Next: continue to the next page

Save for Later: evaluation responses will be saved and can be access from the Workday Inbox

Close: exit the evaluation, responses will not be saved

Submit: evaluation is complete, edits cannot be made after submission

Send Back: evaluation is returned to employee, manager responses will not be saved

Access Manager Evaluation

- The manager evaluation can be accessed from the manager's My Tasks
- When ready to start the manager evaluation, the manager should select **Get Started** to access the task
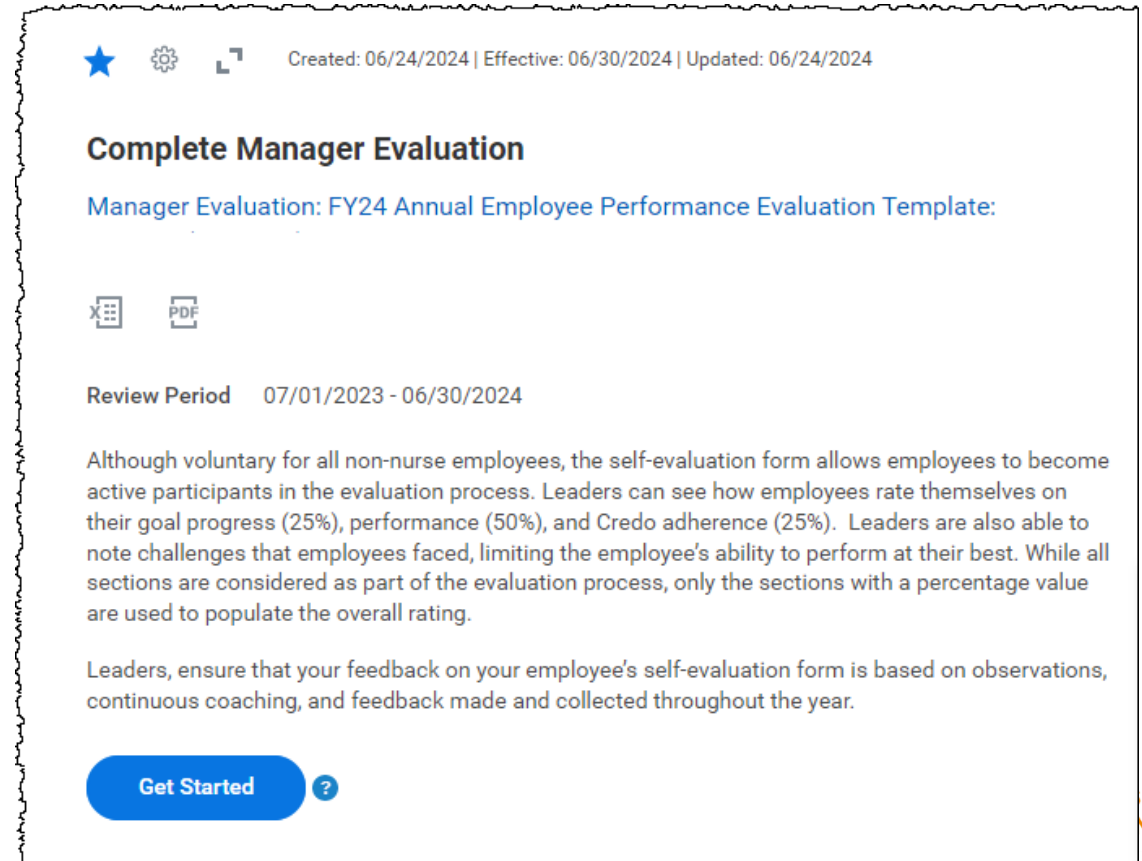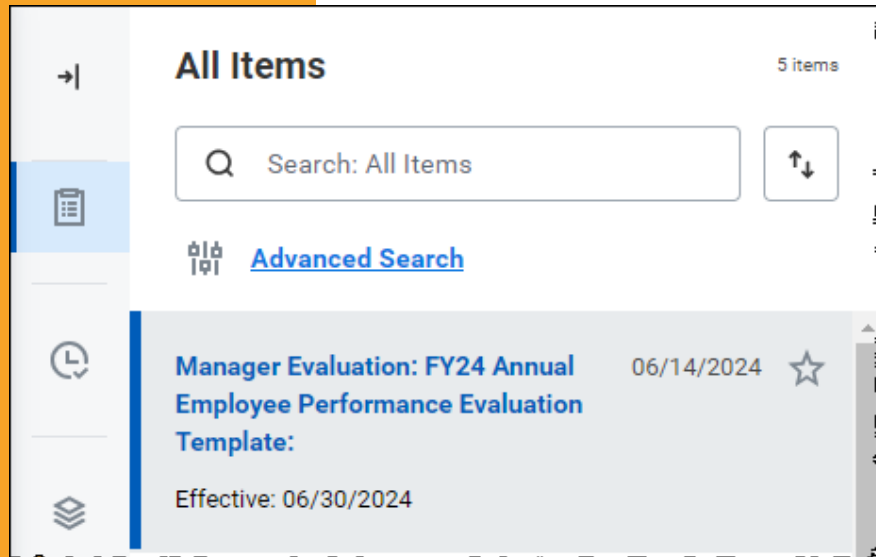
Prior Year Goals

If your employees have goals that were not archived from prior years before June 4, they will populate to the evaluation. To ensure that these goals do not impact the evaluation rating, follow the steps below or review the linked resource.

1. Check the due date of each goal. If it is not in FY24, change the status to **Not Applicable**.
2. Ensure that the weight for these goals is listed at **0**.
3. Update the FY24 goal weights as needed so that they equal **100** when added together.

QRG Managing Prior Year Goals

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Optional Sections

Accomplishments are actions in which the employee went above and beyond to help their team and/or department accomplish a performance goal.

Development Items are skills, knowledge, and/or abilities that an employee needs to be successful in their current position or in future positions they aspire to.

- **Professional Development:** the process of preparing for future job positions the employee may aspire to.
- **Skill Enhancement:** the process of building and improving skills specific to current job requirements.

Supporting Documents provide information specific to recent achievements, successful completion of performance goals, development goals, and/or development items.

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Performance Evaluation Conversation

If you think you would like to edit your annual evaluation after you have had your performance review discussion with the employee, you can create a PDF of the annual evaluation to send to your employee and then select **Save for Later**. Once you have had your annual evaluation conversation, you can go back in, revise where needed, and select Submit.

Once you Submit, you are **no longer able to edit your evaluation**.

Manager

Default Rating ❓   Fully Meets Expectations

Rating   Fully Meets Expectations ▼ ❓

Override Calculated Rating ☐ ❓

Complete Manager Acknowledgement

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Manager Acknowledgment

After the employee submits their acknowledgment, the manager will be prompted to complete their manager acknowledgement of the performance evaluation from their Workday Inbox.

Acknowledgement

Manager

Status * [   ]

Comment [Format | B I U A | list | link | expand]

Employee

Status — Acknowledge without Comments

Comment

Acknowledged By

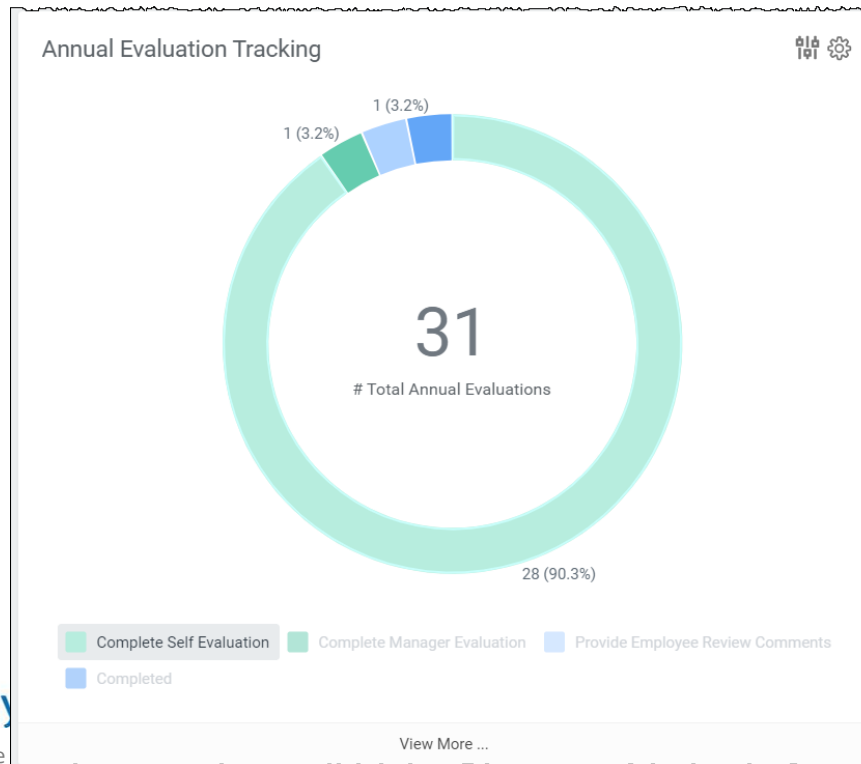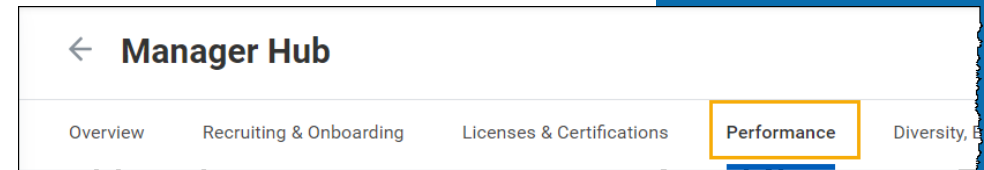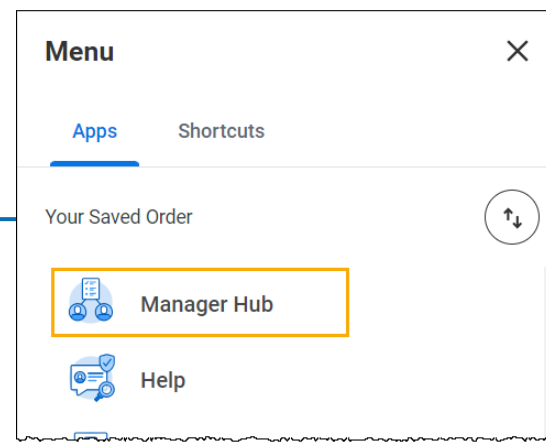Acknowledgement Date — 07/18/2023 10:03 AM

Review the Process

DEMO

Manager Hub

Managers can access the Manager Hub in Workday to track where all of their employees are in the Annual Evaluation Process. Managers can also easily email their team members from this tool to remind them of their annual evaluation.
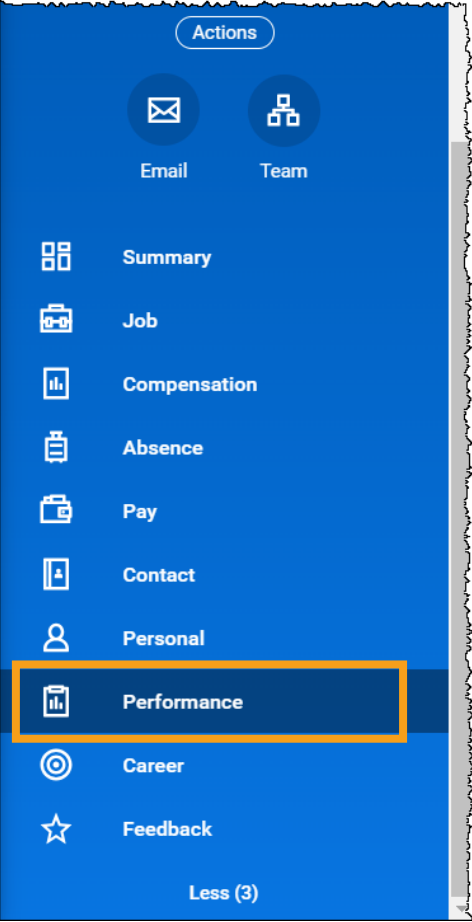

Menu

Apps | Shortcuts

Your Saved Order

- Manager Hub
- Help

← **Manager Hub**

Overview | Recruiting & Onboarding | Licenses & Certifications | Performance | Diversity, E

Annual Evaluation Tracking

1 (3.2%)
1 (3.2%)

31
Total Annual Evaluations

28 (90.3%)

Complete Self Evaluation | Complete Manager Evaluation | Provide Employee Review Comments
Completed

View More ...

Annual Evaluation Tracking - In Progress

Worker	Work Email	Evaluation (Actionable Link)	Date
Sample Employee 1	✉ sample.employee1@vumc.org		06/03,
Sample Employee 2	✉ sample.employee2@vumc.org	Manager Evaluation: FY24 Annual Employee Performance Evaluation Template:	06/03,
Sample Employee 3	✉ sample.employee3@vumc.org		06/03,
Sample Employee 4	✉ sample.employee4@vumc.org		06/03,

View More ...

my workday

Find Completed Performance Reviews

Managers and employees can access their completed Performance Evaluations and their End of Orientation Evaluation under Performance in the employee's profile.

End of Orientation

EOO Process

1. When the employee has reached the end of their orientation period (6 months for exempt employees, 90 days for non-exempt employees) the manager will receive a notification to their My Tasks prompting them to complete the End of Orientation Manager Evaluation.

2. After the manager completes the End of Orientation Evaluation, they will meet to discuss the evaluation with the employee. The manager will need to confirm that they have met from a To Do task that will appear after the manager completes the evaluation.

3. Employee will review and acknowledge the End of Orientation Evaluation. Then the Manager will be prompted to acknowledge also.

4. The End of Orientation Evaluation can be found in the employee's profile under Performance and Performance Reviews.

Evaluation Topics

Evaluation Ratings (*Rating Response*)
- Quality of Work
- Quantity of Work
- Credo
- Ability to Learn
- Initiative
- Availability

Competencies and Requirements (*Yes or No response*)
- Employee has completed Compliance Requirements
- Employee has completed Department Competencies/Onboarding
- Employee and Manager have reviewed the Employee's Job Description
- Employee and Manager have established and reviewed goals and have entered them in Workday

Strengths and Development Opportunities (*Short answer response*)

Conclusion

Key Takeaways

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Access
- If the leader selects **Send Back** or **Close** (without saving), all information that they have input to the Manager Evaluation will be deleted.
- You may need to be logged into the VPN to access and use the Walkme Smart Tips.

Feedback
- When requesting feedback, if you can select a privacy option, select **Do not share with employee**.
- Manager Requested feedback will only appear in the manager evaluation if feedback was given before July 1, 2024. After July 1, feedback received will only appear in the employee profile feedback section.

Goals
- Review all goals to ensure that they are the appropriate FY24 goals.
- All goals should be Performance Goals on the Annual Evaluation.

Performance Evaluation Conversation
- Print PDF icon is available if you need it for your discussion with the employee.
- Managers can have their discussion with the employee prior to submission of the evaluation and changes can be made.

Review and Submit
- Changes cannot be made after submission, be sure to review all sections before hitting submit.
- Manager must acknowledge the evaluation after the employee.

Reminders
- Save often – Workday will time out around 20 minutes of inactivity.
- Remind employees to complete their self-evaluations **before** July 2.

Resources

[WDHR-802-W5_Annual Performance Evaluation for Managers](#)

[QRG_Annual Performance Evaluations for Managers](#)

[QRG_Manage Assigned Goals and Add New Goals](#)

[QRG_Setting Goals on Behalf of Employees](#)

[QRG Managing Prior Year Goals](#)

[QRG End of Orientation Evaluation](#)

If you have technical issues, submit a **Workday Help Ticket.**

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