

# Performance: Admin Performance Review

## Manager & Admin Employee Job Aid

This job aid covers both MANAGER and ADMINISTRATOR EMPLOYEE perspectives.

### Admin Performance Review 2019 Process at a Glance



Find **Guidelines** for Performance Appraisals at <https://facstaff.madisoncollege.edu/in/performance-appraisals>

### Human Resources: Start Admin Performance Review

The HR Partner (Lyrae Nadolski) starts the performance review process in early May.

### Admin Performance Review Section Overview

Section	Description
<b>Job Responsibilities – 15%</b>	Assess rating on the core function of position. <i>Not for adding additional responsibilities.</i>
<b>2018-2019 Performance Goals - 85%</b>	Assess rating on 3-5 projects and performance goals that were unique to this year.
<b>Strengths &amp; Opportunities</b>	Narrative responses to questions: <i>Describe an area of growth this year.</i> <i>Describe an opportunity for development for next year.</i>
<b>Overall Calculated Rating</b>	Overall rating of the year calculated based on rated items in first two sections.
<b>Set Performance Goals for 2019-2020</b>	Set 3-5 S.M.A.R.T. individual goals for the coming year aligned with unit plan.
<b>Summary</b>	All responses on one page. This is the page in which you can <b>PRINT, SAVE for LATER</b> or <b>SUBMIT</b> the review to the next step.

## Save Your Work in the Performance Review


Do not walk away from an *active text entry* box and risk getting logged off. By clicking the check mark at the top-right of any item or clicking *outside* of any active text entry box, text entered is saved.


## Employee: Complete Your Self-Evaluation

The next phase of the performance review process involves the employee's self-evaluation. To complete the self-evaluation, the employee should:

1. Navigate to the **Workday Inbox**.
2. Click the **Self-Evaluation** task to open.



Click **Toggle full screen viewing mode**  in the top-right side of your inbox action to view the evaluation full-screen.

Click **Print**  to print the evaluation (*find link to file in your NOTIFICATIONS*).

**Save for Later** button will keep the Review in your Workday Inbox until you return to **Submit** it.

3. Rate or enter comments in each employee self-evaluation section (**Job Responsibilities – 15%, 2018-2019 Performance Goals – 85%, Strengths & Opportunities, Evidence & Portfolio (Optional), Set Performance Goals for 2019-2020**).

**NOTE:** Instructions for each section are given on-screen

4. Rate your completion of job responsibilities through the year in the **Job Responsibilities - 15%** section. Do not edit the responsibilities themselves. *Do not add responsibilities*. Use the "Evaluation Rating" to enter your rating and reflections.

5. In the **2018-2019 Performance Goals - 85%** section, rate each goal that appears. If expected goals do not appear, add or delete as necessary. Goals are automatically loaded from the employee profile based on the due dates. [See also Job Aid Manage Goals](#).

Check the box to "Use Existing" if goals were established earlier and do not appear automatically.

Keep **Goal Title** as agreed upon. Update **Description** to include outcomes of efforts from the year. Update **status** and **completion date**, if applicable. If **Ongoing** status is chosen, rating will not be available. Goals rated in a performance review should be time-bound and measurable.




NOTE: If employee's goals were edited just prior to the review event and are Awaiting Approval by the Manager, goals will not be available to enter into the Review. **The manager must approve them first.**

6. **Strengths & Opportunities** section features two reflection prompts to explore growth from the year and begin thinking about growth for the next year.
7. **Overall Calculated Rating** displays a calculated overall rating based on the items rated in previous sections. The comment section allows space to give context to the rating.
8. **Evidence & Portfolio (Optional)** section allows file uploads from the year.
9. **Set Performance Goals for 2019-2020** section asks you to add 3-5 performance goals for the coming year.
10. Click **Submit** to complete the evaluation. The evaluation routes to the manager for review.

## Manager: Complete Manager Evaluation of Employee

From the manager's **Inbox**:

1. Click the **Manager Evaluation** task to open.

Click **Toggle full screen viewing mode**  in the top-right side of your inbox action to view the evaluation full-screen.

Click **Print**  to print the evaluation.



An **ALERT** will warn you that there are sections hidden from employee. **Hidden sections** in this review are special instructions for the Manager to have a conversation with the employee. There are no ratings or typed sections that are hidden from employee.



2. Rate or enter comments in each Manager Evaluation section (**Job Responsibilities – 15%**, **2018-19 Performance Goals – 85%**, **Strengths & Opportunities**, **Evidence & Portfolio (Optional)**, **Set Performance Goals for 2019-20**).

**NOTE:** Instructions for each section are given on-screen



As a manager, prepare to give developmental feedback. Use the resources provided in the Manager's Toolkit.

3. Rate your completion of job responsibilities through the year in the **Job Responsibilities - 15%** section. Do not edit the responsibilities themselves. *Do not add responsibilities.* Use the "Evaluation Rating" to enter your rating and reflections.

4. In the **2018-19 Performance Goals - 85%** section, rate each goal that appears. If expected goals do not appear, add or delete as necessary. Goals are automatically loaded from the employee profile based on the due dates. [See also Job Aid Manage Goals.](#)

When adding a goal, check the box to "Use Existing" if goals were established earlier and do not appear automatically.

Keep **Goal Title** as agreed upon. Update **Description** to include outcomes of efforts from the year if necessary. Update **status** and **completion date**, if applicable. If **Ongoing** status is chosen, rating will not be available. Goals rated in a performance review should be time-bound and measurable.




**NOTE:** If your goals are Awaiting Approval by the Manager, no one will be able to choose those goals for review. **The manager must approve them first.**

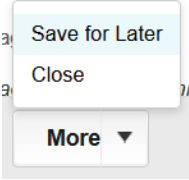
5. **Strengths & Opportunities** section features two reflection prompts to explore growth from the year and begin thinking about growth for the next year.
6. **Overall Calculated Rating** displays a calculated overall rating based on the items rated in previous sections. The comment section allows space to give context to the rating.
7. **Evidence & Portfolio (Optional)** section features a file upload. Please **do not upload** an employee's Performance Improvement Plan (PIP).
8. In the **Set Performance Goals for 2019-2020** section add goals by clicking the **Add** button. Section should feature three to five goals for the coming fiscal year. Ensure goals entered for employee are S.M.A.R.T. and have a due date entered.

9. **Special Instructions for Manager** section is hidden from employee.

To **review this evaluation with your employee** before finalizing:

Click **Print**  to print the evaluation.

Next to the **Submit** button, find **Save for Later**. The review will return to your Inbox with your evaluation saved.



10. After discussing the Review with your employee, return to Workday inbox. Click **Submit** to complete the evaluation. The evaluation routes to the **Manager** to finalize the evaluation.

## Manager: Complete Manager Evaluation

1. Navigate to the Workday **Inbox**.
2. Set the **status** to "Accept with comment" or "Accept without comment."
3. **Submit** the evaluation.

## Employee: Provide Employee Review Comments

1. Navigate to the Workday **Inbox**.
2. Set the **status** to "Accept with comment" or "Accept without comment," enter comments as needed.
3. **Submit** the evaluation. It routes to the **Cabinet Member** for final submission.

## Vice President: Approve Evaluation


1. Navigate to the **Workday Inbox**.
2. Comment on any Goal with the comment function.
3. **Submit** the evaluation. It routes to Lyrae in **Human Resources**.



A Vice President can also "**Send Back**" a performance evaluation to any step in this process for re-submission.


## Manager: Print Performance Evaluations

From the **Team Performance** worklet:

1. Click **Printable Review** to render an Adobe PDF version of the entire review.
2. Select the Employee Review.
3. Click **OK**.
4. Click the **Print** icon . A notification displays below your Inbox when the report generates.
5. Click the **notification** link (or go to **Notifications** in the menu under your name) to access the report. The PDF downloads.
6. Open the PDF to view or print.

## Manager or Employee: View Past Performance Reviews

*Only Admin Reviews starting with the 2016-17 review will be in Workday.* From the Employee's Profile:

1. Click the **Career** tab.
2. Click **Performance Reviews**.
3. Click **View** button 

### Manager: Reassign Review to Other Manager

Manager role is assigned based on the percentage of activity approved by Managers over the course of the review period.

#### For Example:

*Employee asked for time off 5 times throughout the year, and transferred to a new manager mid-year. If 3 of the 5 time off transactions were approved by **Manager 1**, the review will route to **Manager 1**. **Manager 1** has the option of reassigning the review to **Manager 2**.*

If you believe the review has gone to the wrong manager, the manager receiving the review can re-assign to a different manager. **Manager for Majority of Events may need to re-assign the review twice.** Once for the evaluation, once for the final approval.

From **Review Manager Evaluation** item in Manager's **Workday Inbox...**

1. Click the **Task Actions** Cog > **Reassign**

2. In the *My Tasks* table, scroll right to find the **Proposed Person**. Enter the name of the intended manager and press enter.

*NOTE: If the intended manager is not in Workday as a manager of the employee, you will not be able to choose that manager.*

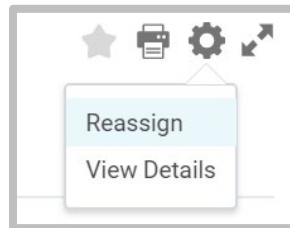
3. Enter a **Reassignment Reason** such as, "XYZ Manager is better positioned to lead the performance review. I will work with Manager XYZ to provide review input for the portion of the year that I lead the employee."

4. Click **OK**.



The reassignment routes to **HR to approve**. The review will remain in your Workday Inbox till the reassignment is approved by HR.

CONTINUED... FAQ'S ABOUT PERFORMANCE REVIEW



## Admin Performance Reviews FAQs

**I don't like the responsibilities that are listed for my position. How can I change them?**

Contact your HR Business Partner. Position Responsibilities must align with a standard and be agreed upon by the manager and employee.

**My performance goals aren't showing up in my performance review. How can I add them?**

Click "Add" on the Performance Goals screen. Use the checkbox, "Use Existing" to use a previous goal. NOTE: Deleting goals from the review will not delete them from the worker profile.

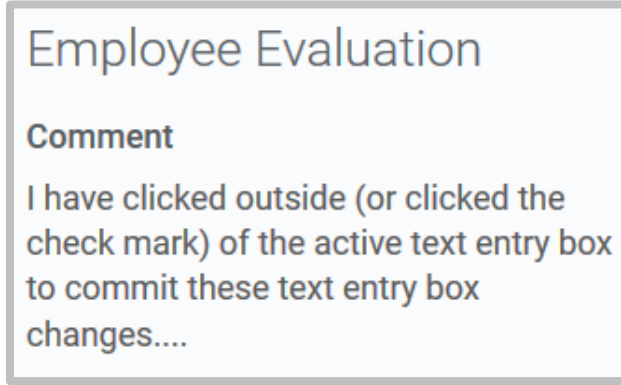
**Goals I added in the review aren't on the "MY GOALS" report. When will they show up there?**

When the review is complete and submitted to HR, your review-entered goals will appear on your Individual Goals report.

**EEK! I entered my answer into the review, but had to walk away from my computer. Now my changes are lost and I feel very frustrated!**

It is aggravating to lose work- especially if you feel the work was good. To avoid this in the future, there are two 'modes' for any text entry box in Workday: **active and inactive**. Active text entry boxes are ones that are open and type-able, inactive boxes will become active if clicked on. Make sure to save all work by clicking OUTSIDE of an active text entry box to make it INACTIVE. That will save your changes.

### INACTIVE TEXT ENTRY MODE (text is saved):



### ACTIVE TEXT ENTRY MODE (text is not saved):

