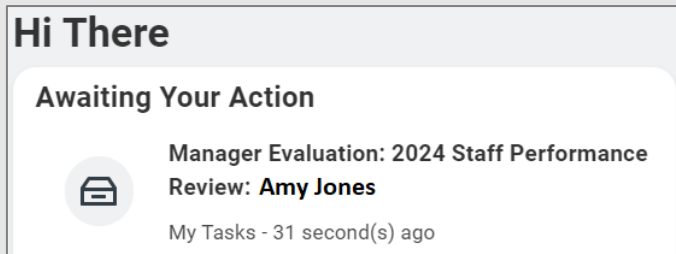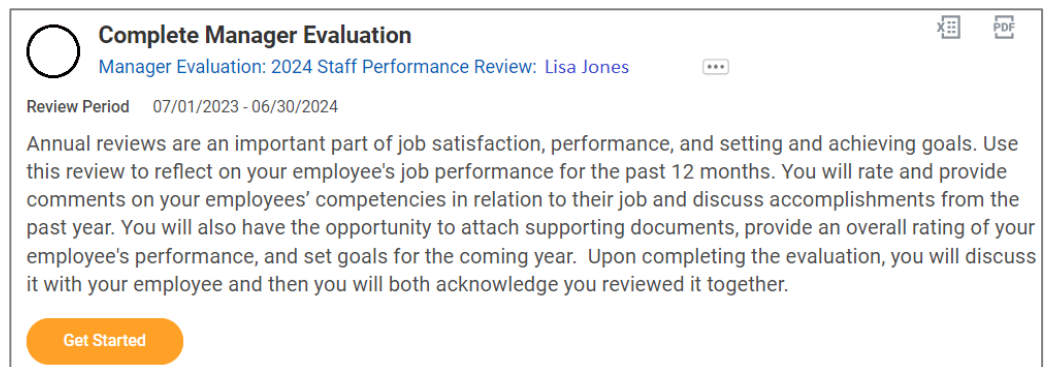# Introduction

The review period spans July 1, 2023 through June 30, 2024. Performance Reviews are due to be completed by July 31, 2024. For additional resources please reference the Performance Review Manager Guide or contact Human Resources at hr@willamette.edu.

Step 1: Accessing the Performance Review

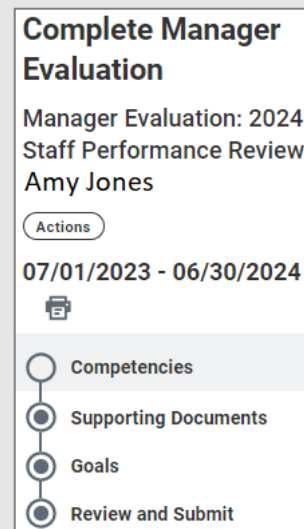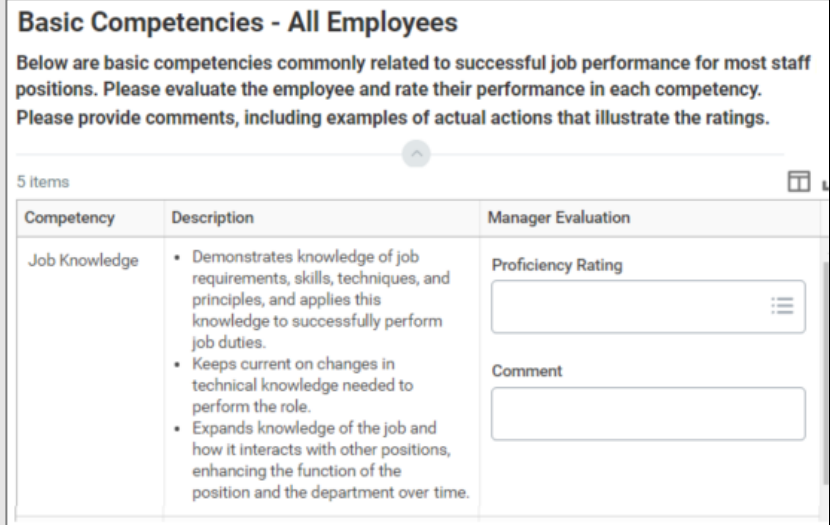|	
1. You will receive a message in your Workday Inbox prompting you to access the review form.	**Hi There** **Awaiting Your Action** **Manager Evaluation: 2024 Staff Performance Review: Amy Jones** My Tasks - 31 second(s) ago
2. You will be presented with the with a brief introduction. Click **Get Started** to launch the review.	**Complete Manager Evaluation** Manager Evaluation: 2024 Staff Performance Review: Lisa Jones Review Period 07/01/2023 - 06/30/2024 Annual reviews are an important part of job satisfaction, performance, and setting and achieving goals. Use this review to reflect on your employee's job performance for the past 12 months. You will rate and provide comments on your employees' competencies in relation to their job and discuss accomplishments from the past year. You will also have the opportunity to attach supporting documents, provide an overall rating of your employee's performance, and set goals for the coming year. Upon completing the evaluation, you will discuss it with your employee and then you will both acknowledge you reviewed it together. Get Started
3. The review is comprised of four sections: • Competencies • Supporting Documents • Goals • Review and Submit You can navigate through the form by using the Next buttons at the bottom of each section. You can also use the menu on the left of the form, clicking on the section you wish to view.	**Complete Manager Evaluation** Manager Evaluation: 2024 Staff Performance Review: Amy Jones (Actions) 07/01/2023 - 06/30/2024 ○ Competencies ◉ Supporting Documents ◉ Goals ◉ Review and Submit

Step 2: Completing the Review Form

2.1 Completing Competency Rating and Comments

1. There are five staff general competencies that apply to all employees: Job Knowledge, Productivity, Quality of Work, Communication/Interpersonal Skills, and Problem Solving. Managers have an additional four competencies: Decision Making, Management of Human Resources, Stewardship, and Planning and Coordination.

Each competency is listed in the left-hand column, followed by a description of it.

Basic Competencies - All Employees
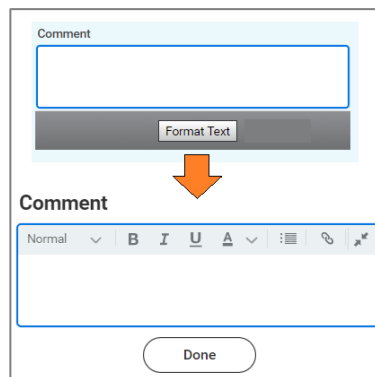
Below are basic competencies commonly related to successful job performance for most staff positions. Please evaluate the employee and rate their performance in each competency. Please provide comments, including examples of actual actions that illustrate the ratings.

5 items

Competency	Description	Manager Evaluation
Job Knowledge	• Demonstrates knowledge of job requirements, skills, techniques, and principles, and applies this knowledge to successfully perform job duties. • Keeps current on changes in technical knowledge needed to perform the role. • Expands knowledge of the job and how it interacts with other positions, enhancing the function of the position and the department over time.	Proficiency Rating Comment

The third column has a field to enter a rating and a space to write comments to support the rating given.

2. To enter a rating for each competency, click in the Proficiency Rating field and select the rating from the resulting list.

Comments can be entered in the comment box. If you wish to add some formatting to the text, click the **Format Text** button.

Please note as specified in the Performance Review Manager Guide, you will be required to enter detail in the comments section.
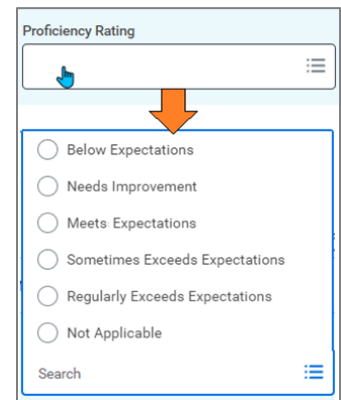
Comment

Format Text

Comment

Normal

Done

Proficiency Rating

- Below Expectations
- Needs Improvement
- Meets Expectations
- Sometimes Exceeds Expectations
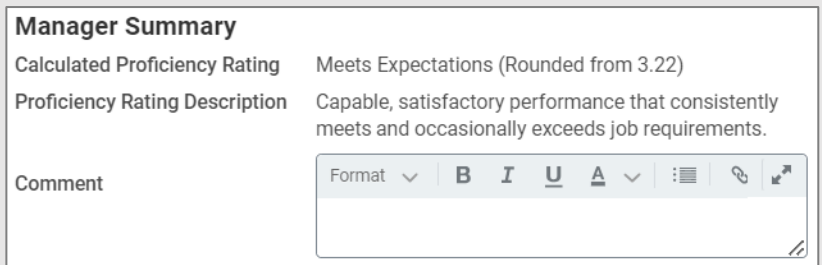- Regularly Exceeds Expectations
- Not Applicable

Search

3. Repeat this process for all the competencies in the form. The summary section at the bottom of the page will show a calculated rating based on your selections from the Proficiency Rating drop-down menus.

When done entering ratings and comments, click the **Next** button.

If desired, you may enter additional summary comments.

Manager Summary

Calculated Proficiency Rating	Meets Expectations (Rounded from 3.22)
Proficiency Rating Description	Capable, satisfactory performance that consistently meets and occasionally exceeds job requirements.
Comment	Format

2.2 Adding Supporting Documents

To add supporting documents, such as self-evaluations, feedback from coworkers, or a list of achievements, either drag and drop the files into the gray field or click **Select Files** to search for and attach the desired documents.

Supporting Documents

Use this section to attach relevant supporting documents, such as self-evaluations, feedback from co-workers, or a list of additional accomplishments.

Manager

Drop files here
or
Select files

When done, click **Next** to continue.

2.3 Add Goals

1. The next section allows you to record specific goals for the next review cycle. To create a goal click the **Add** button.

   Goals

   Use this section to document goals for the forthcoming review period. Enter the goal and a description of the actions needed to reach the goal. The description section can also include metrics that need to be reached to accomplish the goal.

   Add

2. A goals section will open. Place the goal statement in the Goal field and as desired describe the goal in more detail in the Description section.

   If desired, add a due date for the goal completion.

   Disregard the Status drop down, it is not functional at this time.

   If desired, additional comments about the goal can be listed in the Manager Comment section.

   Goal * Format B I U A ≡ ⚬

   Description Format B I U A ≡ ⚬

   Due Date MM/DD/YYYY

   Status select one ▼

   Manager

   Comment Format B I U A ≡ ⚬

   Remove

   Click **Add** to insert another goal.

   Add

3. Click **Next** when all desired goals have been entered.

Step 3: Submission to HR and Employee Review

3.1 Submit for Human Resources Review

<table>
<tr>
<td>1.</td>
<td>You will be presented with a view of the entire review. Read it over carefully.

If you find areas that need to be corrected or modified, click on the section navigation to the left of the review. Make the needed changes and then click Review and Submit again.</td>
<td>Complete Manager Evaluation
Manager Evaluation: 2024
Staff Performance Review: Amy Jones
(Actions)
07/01/2023 - 06/30/2024

⊙ Competencies
⊙ Supporting Documents
⊙ Goals
○ Review and Submit</td>
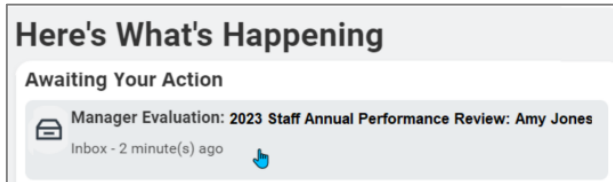</tr>
<tr>
<td>2.</td>
<td colspan="2">When you are satisfied with the review, click the [Submit] button</td>
</tr>
<tr>
<td>3.</td>
<td colspan="2">The performance review will be sent to Human Resources to be read and approved. HR will send the review back to you which will generate a task in Workday. The message will either:

• Confirm you can proceed with presenting the review to the employee. Move to step 3.2.
• Inform you the review needs revision in order to meet quality standards. An email will be sent separately providing revision suggestions.</td>
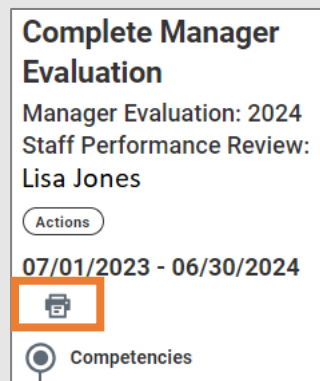</tr>
</table>

3.2 Print the Review and Present to the Employee

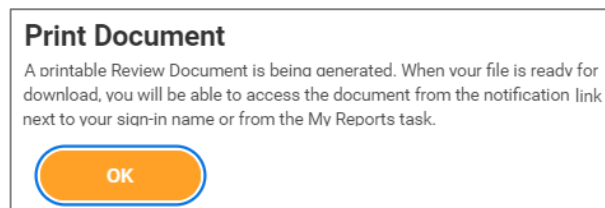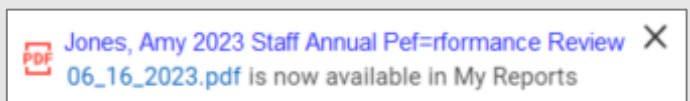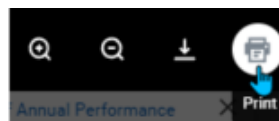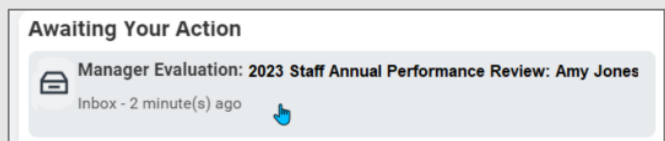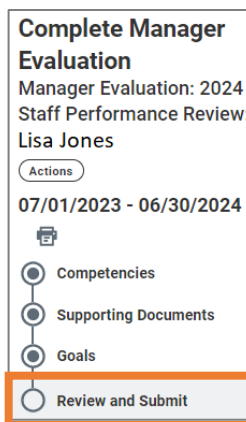|	
1.	After HR sends the review back with approval to proceed, you may present the review to the employee. You can either print a paper copy for the employee to review prior to your discussion or create a PDF that can be sent by email for them to read prior to meeting with them. **Note:** Do not respond to the task in your Workday Inbox until you have met with the employee.
2.	Click on the Review task in waiting for you in Workday.
	Here's What's Happening **Awaiting Your Action** Manager Evaluation: **2023 Staff Annual Performance Review: Amy Jones** Inbox - 2 minute(s) ago
3.	Again, do not click the **Approve** button yet. Instead, click the printer icon in the left-hand navigation.
	Complete Manager Evaluation Manager Evaluation: 2024 Staff Performance Review: Lisa Jones (Actions) 07/01/2023 - 06/30/2024 🖨 ◉ Competencies
4.	You will receive a confirmation message that a printable version will become available.
	Print Document A printable Review Document is being generated. When your file is ready for download, you will be able to access the document from the notification link next to your sign-in name or from the My Reports task. **OK**
5.	After a moment, a pop up will appear in the upper right-hand corner of the screen. Click on the link to open the document.
	📄 Jones, Amy 2023 Staff Annual Pef=rformance Review 06_16_2023.pdf is now available in My Reports ✕
6.	Click the print icon in the upper right corner.
	🔍 🔍 ⬇ 🖨 Annual Performance ✕ Print
7.	From the resulting menu, you can select the printer of your choice, or you can select **Save as PDF** to create an electronic version that can be sent to the employee by email.
	🖨 HR Office ▾ HR Office PNCA_Hold Save as PDF See more…
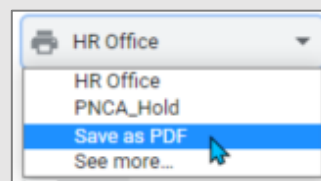
3.3 Send Review Back to Human Resources

1.	After you have discussed the review with your employee, go back to your inbox in Workday and click on the Manager Evaluation task.	**Awaiting Your Action** Manager Evaluation: **2023 Staff Annual Performance Review: Amy Jones** Inbox - 2 minute(s) ago
2.	Go to the left-hand navigation and select the **Review and Submit** section. Click (Next) on the bottom of the screen.	**Complete Manager Evaluation** Manager Evaluation: 2024 Staff Performance Review: Lisa Jones (Actions) 07/01/2023 - 06/30/2024 ◉ Competencies ◉ Supporting Documents ◉ Goals ○ Review and Submit

3.4 Employee and Manager Acknowledgement

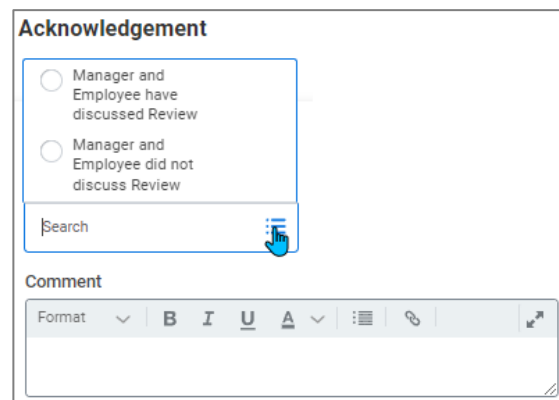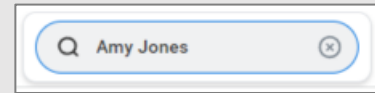|		
1.	Human Resources will submit the review, triggering a task in Workday for employees to acknowledge they have met with their supervisor to discuss it. The employee may also add comments as desired.	
2.	Once the employee has acknowledged the review delivery, a task will appear in Workday for you to also acknowledge the review delivery. Clicking on the task will present a copy of the review.	**Awaiting Your Action** Manager Evaluation: **2023 Staff Annual Performance Review: Amy Jones** Inbox - 2 minute(s) ago
2.	Click (Next) the bottom of the screen to bring you to the acknowledgement screen.	
3.	Click in the Status field and select the first choice, **Manager and Employee have discussed Review**. Enter any additional comments in the Comments field and click (Submit).	**Acknowledgement** ○ Manager and Employee have discussed Review ○ Manager and Employee did not discuss Review Search Comment Format ∨ B I U A ∨ ☰ 🔗
4.	The review will go back to HR for one final check and approval to complete the process.	
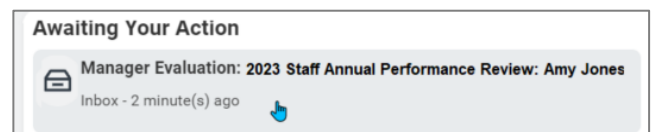
Appendix

Accessing Completed Performance Reviews

1.	There may be times you wish to review a recently delivered or historical performance review. To access the reviews, first enter the employee's name in the Search field.
2.	In the left-hand navigation, scroll down to Performance and select it.
3.	A list of performance reviews will be visible. Click on the desired review to view it.
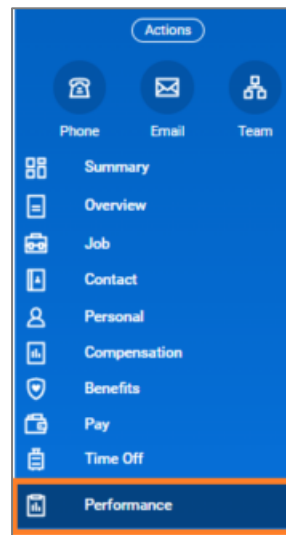
Printing the Goals or Other Sections for Review

|	
1.	There may be times when you wish to print individual sections of the review. Printing the goals section could be particularly useful to review and update progress with the employee periodically.
2.	To do so, follow the same process described above to access the performance review.
3.	Click the (View) button to the right of the review you wish to see.
4.	In the left-hand navigation, click the last section, Summary.
5.	You will be presented with the review broken into sections. Go to the section you wish and click the PDF icon in the upper right corner.
6.	You will be prompted to Download the section.
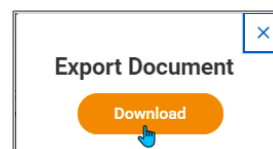
Student Worker Supervision Instructions

There are instances when an employee who does not manage other staff will supervise student employees. This section describes how to document this work properly within the performance review.

Situation 1: Student Worker Supervision Listed in Job Description Duties

If supervision of student workers is contained within the supervisor written job description, then complete the **Management of Human Resources** section within the manager competencies on the review. The other sections, Decision Making, Stewardship, and Planning and Coordination should rated as **Not Applicable**.

Situation 2: Student Worker Supervision is Not Listed in Job Description Duties

In this situation, enter Not Applicable in every section in the Managerial Competencies section. You may address the work within the Productivity and other applicable competencies in the Competencies section.