

Description: This job aid provides instructions on how to complete the self-assessment questions for

BEFORE YOU BEGIN

Request a copy of your job description from your manager if you do not have one already.

ACCESS THE SELF EVALUATION

1. Select **Self Evaluation: Annual Performance Review (IC)**.

The screenshot shows an email interface. At the top, there is a 'MENU' button, a logo, and a search bar. The email is titled 'Self Evaluation: Annual Staff Performance Review (IC)'. The review period is '07/01/2022 - 06/30/2023'. The email body contains the following text:

As part of this year's performance management process, please complete the following form and discuss it with your manager. *Your input in the review process is important. This is your opportunity to let your manager know about your job performance, accomplishments and your career and/or professional development goals.*

Timeline for 2023 Year-End Annual Performance Reviews.

- On March 16, 2023 Year-End/Annual Review training began for managers and staff.
- On March 22, 2023, the Year-End/Annual Review process will open and all Eligible Staff will be able to complete self-evaluations.
- On May 19, 2023, the Year-End/Annual Review process will end. This means that all self-evaluations and manager evaluations must be completed and submitted in Workday by May 19th.

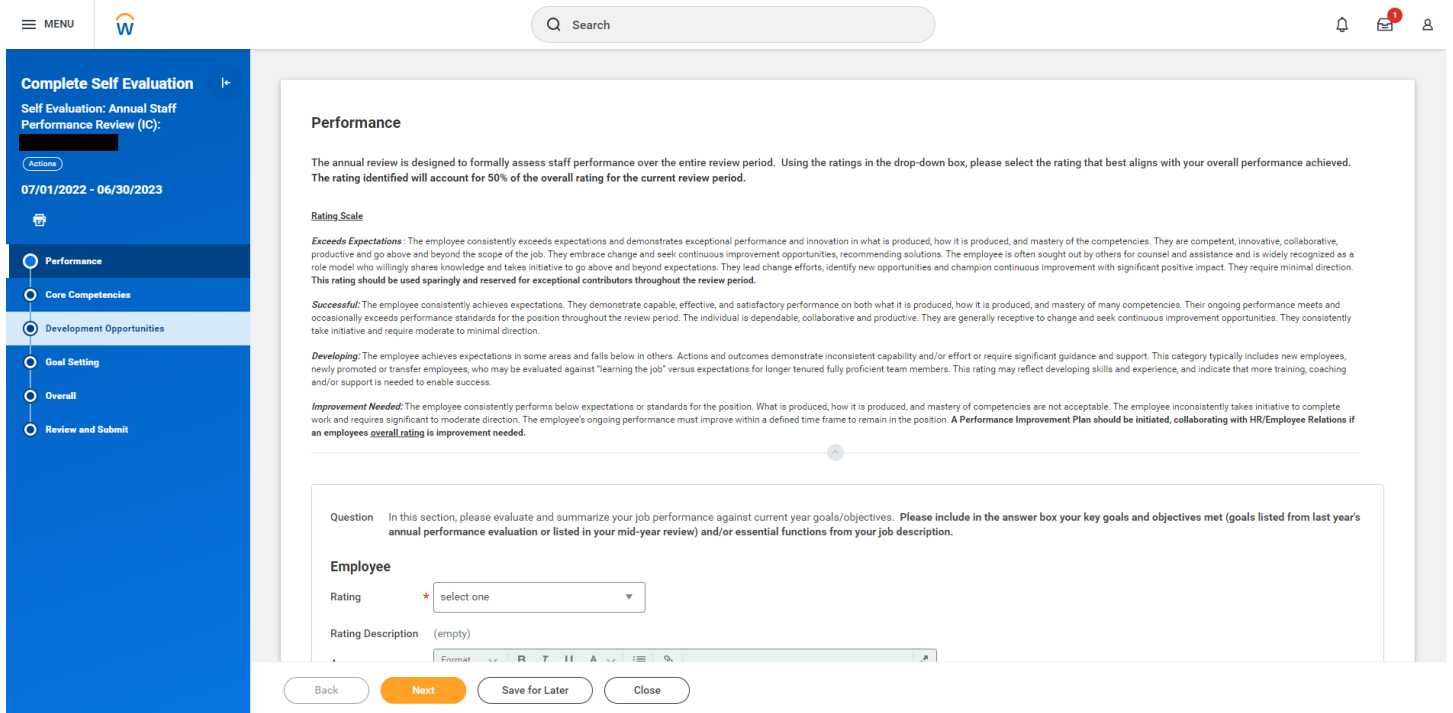
Training:
[Manager and Staff Annual Review Training](#) is available now through April.
 Computer-based Training and Recorded training sessions will be available on the [TAP Website](#).

At the bottom of the email content, there is a 'Get Started' button.

2. Click **Get Started**.

COMPLETING THE SELF-EVALUATION QUESTIONS

- 1. There are four sections of the form containing a total of 7 questions. All questions are required. Be sure to answer the questions with as much detail as possible.



For each question:

- a. Click the rating drop down menu and select which rating best applies to you and your position.

Employee

Rating

* select one

Rating Description

select one

Exceeds Expectations

Successful

Developing

Improvement Needed

Answer

b.

Employee

Rating * Successful ▼

Rating Description Behavioral definition: The employee consistently achieves expectations. They demonstrate capable, effective, and satisfactory performance on both what it is produced, how it is produced, and mastery of many competencies. Their ongoing performance meets and occasionally exceeds performance standards for the position throughout the review period. The individual is dependable, collaborative and productive. They are generally receptive to change and seek continuous improvement opportunities. They consistently take initiative and require moderate to minimal direction.

Answer

Normal ▼ | **B** | *I* | U | **A** ▼ | ☰ | 🔗 | ↵ ↗

Provide complete, detailed answers.

c. Click **Next** for the next question.

d. Use **Save for Later** to save the form for editing at a later time.

When all questions have been answered, click **Submit**.



Success! Event submitted

Up Next: [REDACTED] | Annual Staff Performance Review
(IC): [REDACTED] - Complete Manager Evaluation

[View Details](#)

Next steps:

Your manager will respond to your self-evaluation questions and schedule a meeting to discuss your evaluation.

1. If your manager requires additional information they can send it back for you to edit. You will receive an Inbox action.

- a. Click **Get Started**.



The screenshot shows a user interface for a self-evaluation. On the left, there are filters for 'Viewing: All' and 'Sort By: Newest'. Below these is a list item for 'Self Evaluation: Annual Performance Review (IC) - WIP: [redacted]' with a star icon and '50 second(s) ago - Effective 06/30/2023'. The main content area is titled 'Complete Self Evaluation' and includes a subtitle 'Self Evaluation: Annual Performance Review (IC) - WIP: [redacted]'. Below the subtitle, it shows the 'Review Period' as '07/01/2022 - 06/30/2023' and '50 second(s) ago - Effective 06/30/2023'. A paragraph of text reads: 'As part of this year's performance management process, please complete the following form and discuss it with your manager. Your input in the review process is important. This is your opportunity to let your manager know about your job performance, accomplishments and your career and/or professional development goals.' At the bottom of this section is an orange 'Get Started' button.

2. Edit your answers as you did above, then submit.
 3. After the one-to-one meeting, your manager will add comments, a rating, acknowledge the confirmation statement and submit the evaluation.
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ACKNOWLEDGE AND COMPLETE THE REVIEW PROCESS.

Once your manager completes and submits the review, you will see an Inbox Action item to confirm that you and your manager completed the mid-year review process.

1. Review the Additional Confirmation statement

Inbox

Actions
Archive

Viewing: All
Sort By: Newest

Manager Evaluation: Annual Staff Performance Review (IC): [REDACTED] ☆

5 minute(s) ago - Effective 06/30/2023

Provide Employee Review Comments Manager Evaluation: Annual Staff Performance Review (IC): [REDACTED]

Evaluated By [REDACTED] 5 minute(s) ago - Effective 06/30/2023

Review Period 07/01/2022 - 06/30/2023

I acknowledge that my manager and I have reviewed and discussed the contents and evaluations of this performance review.

Additional Confirmation:

- The job description was reviewed and updated, or will be reviewed and updated in the near future, should changes be necessary.
- The year-end review has been fully completed.
- Ongoing check-in meetings have taken place or will be scheduled.

[Get Started](#)

2. Click Get Started.

3. Review Summary, and then click Next.

Provide Employee Review Comments

Manager Evaluation: Annual Staff Performance Review (IC): [REDACTED]

07/01/2022 - 06/30/2023

Evaluated By: [REDACTED]

Summary

Acknowledgement

Summary

Performance

Question In this section, please evaluate and summarize your overall job performance against current year goals/objectives. Please include in the answer box your key goals and objectives met (goals listed from last year's annual performance evaluation or listed in your mid-year review) and/or essential functions from your job description.

Manager

Rating Successful

Rating Description Behavioral definition: The employee consistently achieves expectations. They demonstrate capable, effective, and satisfactory performance on both what it is produced, how it is produced, and mastery of many competencies. Their ongoing performance meets and occasionally exceeds performance standards for the position throughout the review period. The individual is dependable, collaborative and productive. They are generally receptive to change and seek continuous improvement opportunities. They consistently take initiative and require moderate to minimal direction.

Answer Enter comments pertaining to your employees overall performance for this review period.

Manager Summary

Overall Rating Weight 50

Calculated Rating Successful

Rating Description Behavioral definition: The employee consistently achieves expectations. They demonstrate capable, effective, and satisfactory performance on both what it is produced, how it is produced, and mastery of many competencies. Their ongoing performance meets and occasionally exceeds performance standards for the position throughout the review period. The individual is dependable, collaborative and productive. They are generally receptive to change and seek continuous improvement opportunities. They consistently take initiative and require moderate to minimal direction.

Employee

Rating Successful

Rating Description Behavioral definition: The employee consistently achieves expectations. They demonstrate capable, effective, and satisfactory performance on both what it is produced, how it is produced, and mastery of many competencies. Their ongoing performance meets and occasionally exceeds performance standards for the position throughout the review period. The individual is dependable, collaborative and productive. They are generally receptive to change and seek continuous improvement opportunities. They consistently take initiative and require moderate to minimal direction.

Answer Provide complete, detailed answers.

Employee Summary

Calculated Rating Successful

Rating Description Behavioral definition: The employee consistently achieves expectations. They demonstrate capable, effective, and satisfactory performance on both what it is produced, how it is produced, and mastery of many competencies. Their ongoing performance meets and occasionally exceeds performance standards for the position throughout the review period. The individual is dependable, collaborative and productive. They are generally receptive to change and seek continuous improvement opportunities. They consistently take initiative and require moderate to minimal direction.

[Back](#) [Next](#) [Close](#)

4. In the **Status** field select:

- Acknowledge Review without Comments, or
- Acknowledge Review with Comments.

Employee

Status *

Comment Acknowledge Review without Comments
 Acknowledge Review with Comments

a. Enter comments if necessary.

Employee

Status *

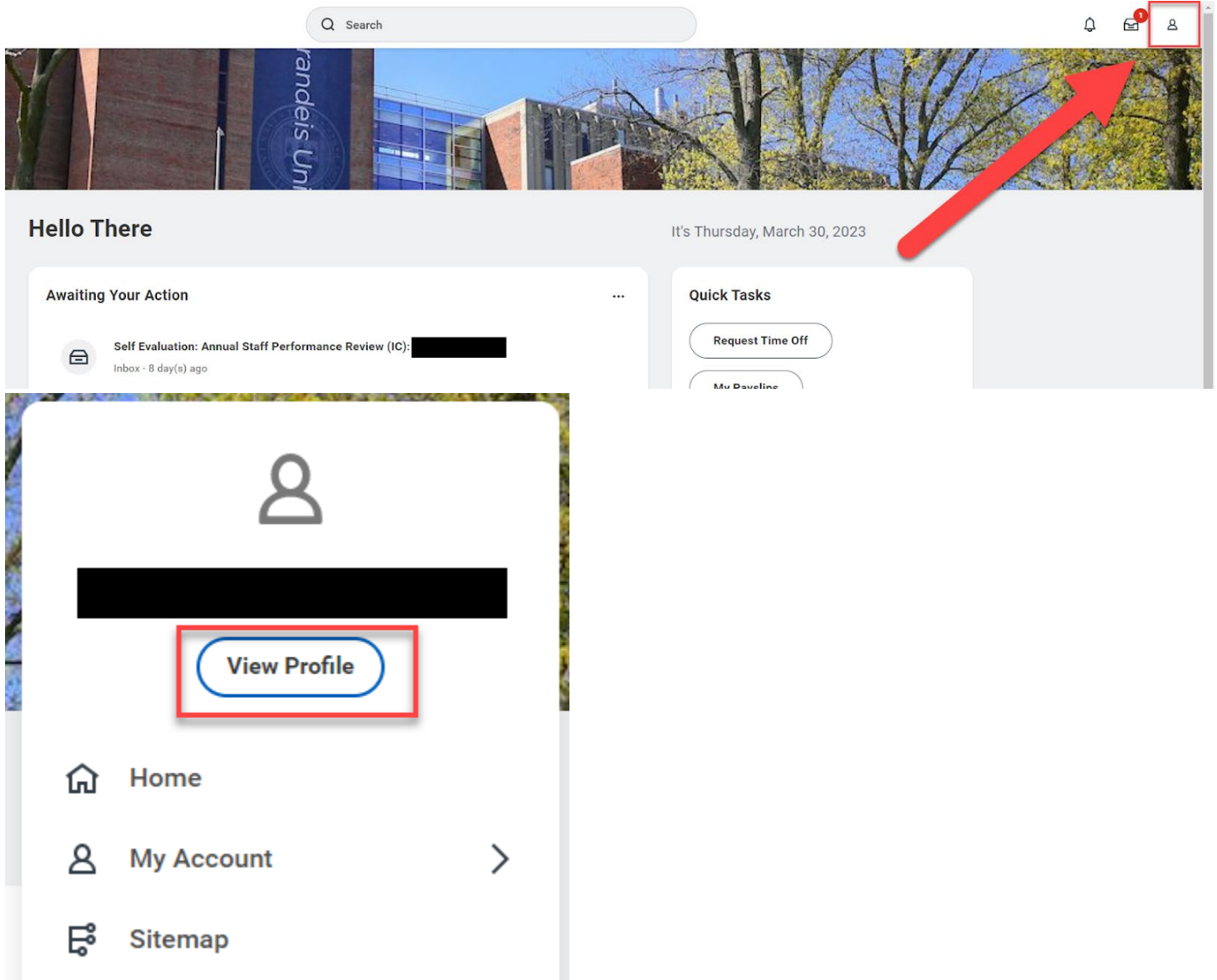
Comment

b. Click **Submit** to complete the process.

Success! Event submitted
[View Details](#)

VIEW THE COMPLETED REVIEW

1. From the Workday workscreen, click the profile icon in the upper right-hand corner and click **View Profile**.



2. Select **Performance** from the menu on the left.
3. Then **Performance Reviews** sub-tab across the top.

- If the section is empty, that means that your manager has not submitted the review for final approval.

Individual Goals

Performance Reviews

Completed 2 items

Review	Start Date	End Date	Manager Rating		
Annual Performance Review (IC) - WIP [REDACTED]	07/01/2022	06/30/2023	Successful	View	Create New PDF
Mid-Year Review [REDACTED]	07/01/2022	06/30/2023	On Track	View	Create New PDF

- Click **View** to see the completed review.
 - Click **Create New PDF** to save and print the completed review.
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