Performance Management Process
UChicago Employee

Quick Reference Guide

**Purpose:** This document informs a current UChicago employee what actions to take for each period of the Performance Management Process:

1. Goal Setting and Development
2. Mid-Year Calibration
3. Year-End Review

**Goal Setting:**
This process will enable an employee to enter your goals for the current fiscal year.

**Note:** Some managers enter goals on behalf of the employee.

Steps to Adding Goals:
1. From your Workday Inbox, click on Task **Self Evaluation: Goal Setting and Development Planning.**
   ```
   23 day(s) ago - Effective 08/18/2018
   ```
2. Select **Go to Guided Editor**
   ```
   Go to Guided Editor
   A simple step-by-step guide
   ```
3. Select Add 

**Keep in mind**
- Your manager will be able to see all information that you enter on your performance review.
- Once you and your manager complete the Mid-Year Calibration and Year End review in Workday, it is expected that your manager meets with the employee in person.

**Information needed**
- Three – five personal goals.
- Each goal should be written using the SMART goal format.
- Each goal should have an assigned weight.
4. Under **Goal**, enter a goal that is in SMART goal format.

5. Under **Description**, enter one or two sentences about your goal.

6. **Optional** Select the appropriate organizational goal in the **Supports** field.
   
   ❗️ Note: not all organizations will have goals available. Skip this step, if no fields are available to select.

7. Under **Weighting**, type in a percentage to assign a weight to each individual goal.

8. Under **Milestones**, check the **Add Milestone** check box. Enter a **name**, **due date**, and **status for the milestone**. To add multiple milestones, click outside the **Goals** box, click back, into the Goals box then click on the additional **Add Milestone** check box.
   
   ❗️ Note: Milestones are concrete accomplishments that contribute to a goal.
**Note:** Weighting is used to “skew” the overall calculated rate; which allows the higher rated goals to contribute more towards the overall rating.

The total weight assignments must equal 100%, if a goal should not hold a weighted value type in “0” for the value.

9. Select **Add** to add additional goals, until all goals are in Workday.

10. Select **Next**.

11. Review. Select the **Edit** button, to make changes. Select the check mark to save changes.

12. When the review is complete, click the **Submit** button.

Your goal will route to your manager for approval.

**Mid-Year Calibration**

This process provides the employee the ability to evaluate yourself against your goals.

**Steps to complete for your Mid-Year Calibration**

1. From your Workday Inbox, click on Task **Self Evaluation: Mid-Year Calibration**.

2. Select **Go to Guided Editor**

3. Scroll down to **Employee Evaluation** section. In the **Rating** field, select your rating for the specific goal.
4. Enter Comments, to support your rating.

5. Select Next. Continue to select Next, to rate each goal.

6. After all goals are rated, select Submit.
   Your rating will route to your manager for manager evaluation.

7. Employee must meet with his/her manager to discuss the performance review.
   a. After the meeting, return to the Workday Inbox.
   b. From the To-Do: Manager Evaluation: Mid-Year Calibration,
   c. Using the related prompt, select I acknowledge.
   d. Select Submit.

This completes that Mid-Year Calibration Performance Review.
Year-End Review
This process provides the employee the ability to evaluate yourself against your goals.

Steps to complete for your Year-End Review.

1. From your Workday Inbox, click on Task **Self Evaluation: Year-End Review**.

2. Follow steps 2 – 7 Mid-Year Calibration to complete the Year-End Review.

💡 **Note:** The final rating in the Year-End Review drives the annual compensation decisions.