

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:

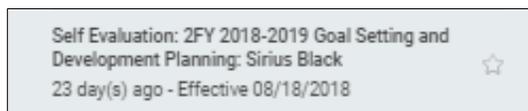
This process will enable an employee to enter your goals for the current fiscal year.



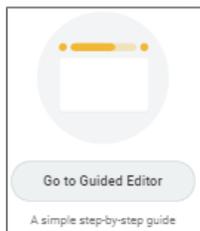
Note: Some managers enter goals on behalf of the employee.

Steps to Adding Goals:

1. From your Workday Inbox, click on Task **Self Evaluation: Goal Setting and Development Planning**.



2. Select **Go to Guided Editor**



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.

Use Existing Goal

Goal * **4**

Format **B I U A** **Type in one SMART goal.**

Description **5** *Optional*

Supports **6** *Optional*

Weighting **7** 0

Milestones **8** *Optional*
(empty)

View Milestones

Add Milestone **←**

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.

	Weight
Goal	25
Complete leadership training course before the end of the quarter	25
Improve ability to manage working remotely, by establishing set communication guidelines for when working out of office.	25
Improve presentation skills by enlisting help from a capable co-worker or contact, in order to make things more engaging for the team	25
Manage the department budget to stay within appropriations and accomplish 85% of service results by the end of the fiscal year	25
Total:	100

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.



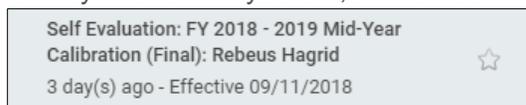
Your goal will route to your manager for approval.

Mid-Year Calibration

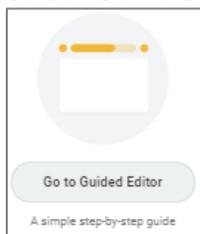
This process provides the employee the ability to evaluate yourself against your goals.

Steps to complete for your Mid-Year Calibration

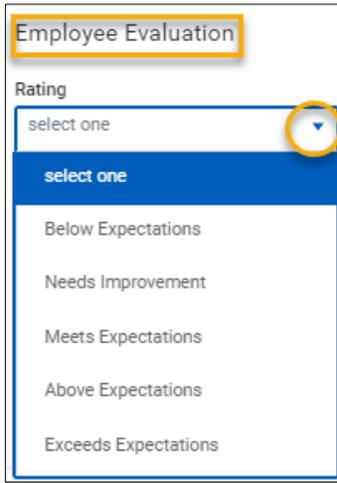
1. From your Workday Inbox, click on Task **Self Evaluation: Mid-Year Calibration**.



2. Select **Go to Guided Editor**



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



The screenshot shows a dropdown menu titled "Employee Evaluation" with the label "Rating". The menu is open, showing a search bar with "select one" and a list of options: "Below Expectations", "Needs Improvement", "Meets Expectations", "Above Expectations", and "Exceeds Expectations". A yellow circle highlights the dropdown arrow.

4. Enter **Comments**, to support your rating.



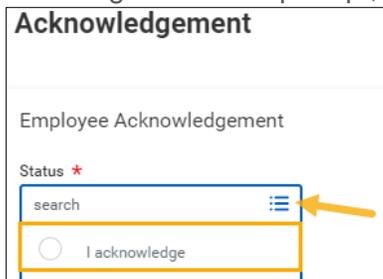
The screenshot shows a text area titled "Comment" with a rich text editor toolbar. The toolbar includes options for "Format", "B" (bold), "I" (italic), "U" (underline), "A" (text color), and a list icon. The text area is currently empty.

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**.



The screenshot shows a form titled "Acknowledgement" with the sub-heading "Employee Acknowledgement". Below this is a "Status" field with a red asterisk. The field contains a search bar with "search" and a list icon. A yellow box highlights the "I acknowledge" option, and a yellow arrow points to the list icon.

- 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.