Keep in mind

- While you will be able to see your employee's comments and ratings on their performance review, you will not be able to edit them.
- Once you finish the performance review in Workday, you are expected to schedule time with your employee to discuss their review in person.

Information Needed

- Goal comments and ratings

Steps:

1. When one of your direct report completes their annual performance review, it will route to your Workday inbox to complete your manager review. To open your inbox, click on the cloud icon in the upper right-hand corner of Workday.

2. Select the task titled **Manager Evaluation: UChicago Performance Review**. To complete one step at a time, select **Go to Guided Editor** on the left. To complete all of the performance review steps on one page, select **Go to Summary Editor** on the right.

Complete Self Evaluation Self Evaluation: UChicago Performance Review Template: 2016-2017: Eleanor Roosevelt ···

Review Period
07/01/2016 - 06/30/2017

4 hour(s) ago - Effective 06/30/2017

Go to Guided Editor
A simple step-by-step guide

Go to Summary Editor
Edit everything on one page

3. The first step of the performance review is **Job Profile Summary**. Please click on the **Add** icon, enter at least one **Responsibility** for the employee, and provide **Comments** on how well they have fulfilled their responsibilities.

4. If you are in Guided Editor mode, click [Next] to move to the next step. If you are in Summary Editor mode, scroll down.

5. The next step of the performance review is **Goal Setting & Results Achievement**. You should see all of the employee's goals from the year displayed under this section, as well as their ratings and comments. In order to give the employee a rating, click on the **Edit** icon (✎) for each goal on the right-hand side of the screen and fill out the **Rating** and **Comment** fields under **Manager Evaluation**.

6. At the bottom of the screen, under **Summary**, you will see an average of your ratings for all of the employee's goals. If you would like to change the overall rating, click on the **Edit** icon (✏), check the **I want to change the Rating** box, and select a new rating in the **Rating** field. Please note that this will **not** change the Calculated Rating.

7. If you are in Guided Editor mode, click [Next] to move to the next step. If you are in Summary Editor mode, scroll down.

8. The next step of the performance review is **Self-Assessment**. You will see a series of questions and the employee's response to each; in order to answer each one, click on the **Edit** icon (✏) and type your answer in the **Answer** text box.

9. When you are finished, click [Next] or scroll down to move to the next step.

10. The next step of the performance review is **Feedback**. This section allows you to see all of the feedback the employee has received from peers in the past year. This is for your reference only; you do not have to take any action on this page. When you are finished reviewing the feedback (in Guided Editor mode), click [Next] to move to the next step.

11. On the next step of the performance review (**Supporting Documents**), you have the option to upload any documentation that you think will be useful for the employee's performance review. To upload a document, click the **Add** button, then click **Attach** and select the appropriate file. You may also enter a comment if you would like.

12. When you are finished, click [Next] or scroll down to move to the next step.

13. The next step of the performance review (**Overall**) gives you another option to override the calculated rating from the **Goal Setting & Achievement Result** page. If you would like to change the overall rating, click on the **Edit** icon ( ), check the **I want to change the Rating** box, and select a new rating in the **Rating** field. Please note that this will **not** change the Calculated Rating.

14. When you are finished (in Guided Editor mode), click [Next] to move to the next step.

15. Once you have completed all the sections of the performance review, you will see a final page that displays all of your previous responses. You can use the **Edit** icon (✎) on any section to change your responses. When you are satisfied with your responses, click [Submit].

16. You will then receive a to-do step in your inbox called **Schedule time to discuss employee performance review**. This step asks you to schedule a meeting with your employee to discuss their performance review. After you have had this meeting, please log back in to Workday and click [Submit] on this step to mark it as complete.

Complete To Do Schedule time to discuss employee performance review •••

For	John Adams
Overall Process	UChicago Performance Review Template: 2016-2017: John Adams
Overall Status	In Progress
Instructions	Please schedule time to discuss the employee performance review with your direct report. Press 'Submit' after your meeting to advance the process to the Employee Acknowledgement step.

17. Once you have submitted the to-do step, the process will go to the employee to acknowledge that both of you have discussed the performance review. You do not need to take any further action on the process.

Up Next

🔵 John Adams

Provide Employee Review Comments

❯ Details and Process