This job aid explains the process for annual performance reviews. Eligible team members will receive an Annual Performance Review.

Manager Performance Review

1. When a team member completes their self-evaluation, you'll receive a notification in your Workday inbox to complete their Performance Review.

Inbox
10 items

Complete Performance Review: Kailey
1 minute(s) ago - Due 05/07/2021; Effective 04/03/2021
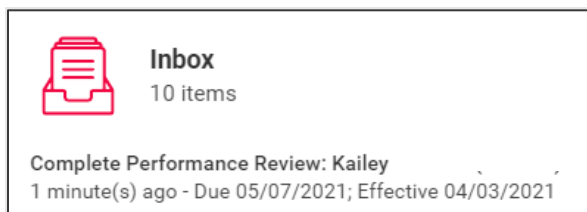
2. Open the task and click **Get Started.**
3. Complete the following fields:
   - **Goals and Accomplishments**
   - **Strengths**
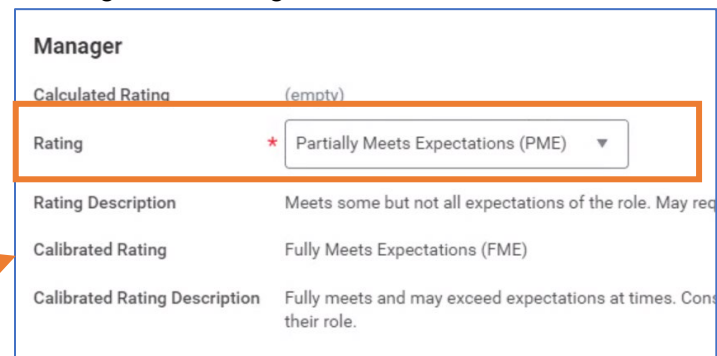   - **Opportunities**

  You will be able to see the team member's comments from their self-evaluation in each section.

4. In the **Overall** section, select a rating for the team member:
   - **Too New to Rate**
   - **Does Not Meet Expectations (DME)**
   - **Partially Meets Expectations (PME)**
   - **Fully Meets Expectations (FME)**
   - **Exceeds Expectations (EE)**
   - **Sets New Standards (SNS)**
5. Click **Next**.

6. Review the Performance Evaluation and click **Submit**. At this point, the review is frozen for calibration.
7. Once calibration is complete, you will receive one of two tasks in your inbox: **HOLD for Performance Conversation** or **Update Review After Calibration.**
   - If you receive the **HOLD for Performance Conversation** task, this indicates that no changes were made to the performance review during calibration. Proceed to step 11 - have a performance conversation with the team member.
   - If you receive the **Update Review After Calibration** task, this indicates there was a change to the performance rating for the team member during calibration. Follow these steps:
     - In the **Overall** section of the team member's review, ensure the **Rating** matches the **Calibrated Rating**. You will receive an error message if the ratings don't match.


     - Update the verbiage in the **Goals and Accomplishments, Strengths,** and **Opportunities** section of the review to reflect the calibrated rating assigned.

- Click **Submit**.
- You will then receive the **HOLD for Meeting with Employee** task in your inbox to prompt you to have a performance conversation.

8. Meet with the team member to discuss the evaluation.

9. After you've discussed the evaluation with the team member, return to the **Hold for Meeting with Employee** task in your inbox.

10. Click **Submit** to complete the task which shares the review with the team member for them to acknowledge.

11. The team member receives a task in their inbox to review and acknowledge the evaluation.
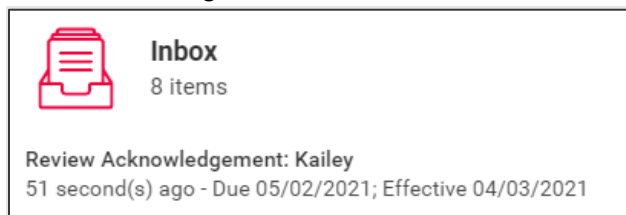
1. Once the team member has reviewed and submitted their acknowledgement of the evaluation, they click **Submit**. This completes the evaluation process.

While mobile capability exists for annual performance reviews, managers should complete the manager evaluation steps on the desktop version.

Send Back Feature

If a team member does not complete their self-assessment or needs to modify it after the review is in their manager's inbox, managers can send the review back to the team member.

1. Navigate to your inbox and select the appropriate team member's review.
2. Select **Get Started.**
3. Navigate to the **Review and Submit** section of the review.
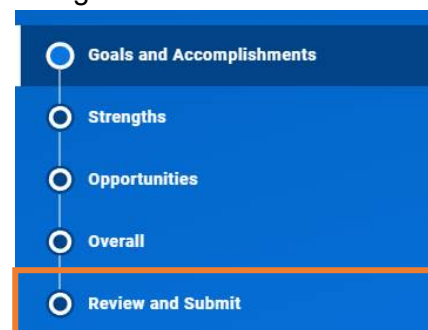
4. Select **Send Back**. This sends the review back to the team member to complete or make edits.

Performance Review Reporting

Managers with direct reports and those who have multiple teams reporting to them can view the status of performance reviews in progress and view performance ratings as a manager completes a review in real-time. Managers can use this report to help manage the performance review process to ensure timely completion of team member and manager task.
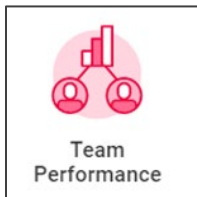
Team Performance

2. Under **Actions**, select **Employee Reviews**
3. Select the **Organization(s)**
4. Check the I**nclude Subordinate Organizations** box
5. In the **Review Templates** field, select **Active Review by Type > Performance Reviews > Annual with Self Evaluation > 2022 Annual Performance Review**