Workday Performance Management
FY19
Agenda

Welcome
What is the Same
What has Changed
Process and Timeline
Important Points and Tips
Resources
Accomplishments

Development and Goals for the **Next Year**

**Strengths & Improvement Opportunities**
What is the Same
Rating Scale

Significantly Exceeds
Exceeds
Meets
Partially Meets
Does Not Meet
Not Applicable
Templates

1. Staff w/ Self Evaluation
   Everyone except those on the below Attachment Only template

2. Attachment Only w/ Self Evaluation
   Management levels 1 – 5
   • Chief Executive
   • Executive Management
   • Senior Management
   • Administrative Management, Director (includes Assistant & Associate Director)
   • Research Professionals – Other

Can be any format the manager chooses such as a memo. Example forms also available on the HROE site.

VPR Office provides a form for Research personnel, which is also on the HROE site.

Research template: but, it is no different than #2 – Texas A&M is not using the Research template.
What has Changed
Upload Attachments

Can now upload attachments on the Staff w/ Self Evaluation template

Overall Rating

Overall rating visible when employee acknowledges evaluation
Status Reporting
Process and Steps
Performance review period launched in Workday

Enter Goals in Workday
Employee enters goals to route to the manager for approval.
Or, the manager can enter goals to route for the employee’s review.

Employee Self-Evaluation
Employee receives an Inbox task to complete the self-evaluation.
Although optional, employee must submit the self-evaluation (even if leaving blank) to initiate subsequent steps.

* Manager Adds Additional Manager and Reviewers
Manager receives an Inbox task to add additional manager \( \rightarrow \) add comments to ALL sections of the evaluation.
After Employee Self-eval, the Manager receives an Inbox task to add an additional reviewer \( \rightarrow \) add ratings and comments in the competencies section of the evaluation.

Manager Drafts Evaluation
Manager receives an Inbox task to conduct the employee evaluation.

IMPORTANT:
Do NOT submit the evaluation at this time. If it is submitted, it cannot be changed or routed back to change.

* An optional step – if the manager would like to bypass these optional steps, skip task must be selected to continue the manager evaluation steps.
Manager meets with the employee to discuss the evaluation.

Manager can make changes to the evaluation draft or send back to the employee to make changes as needed.

Manager submits the evaluation.

**NOTE:**
If the overall rating is partially meets or does not meet expectations, the evaluation will automatically route to the manager’s manager for review; otherwise, it will route to the next step.

Employee receives an **Inbox task** to acknowledge evaluation review.

Manager receives an **Inbox task** to acknowledge the evaluation review and position restrictions.
Timeline
Performance review period launched in Workday

April 1

- **Enter Goals in Workday**
  - By March 29

- **Employee Self-Evaluation**
  - By April 12

- **Manager Adds or Skips Additional Manager and Reviewer**
  - By April 12

- **Manager Drafts Evaluation**
  - By April 26

- **Manager & Employee Discuss Evaluation**
  - By May 10

- **Manager Submits Evaluation**
  - By May 17

- **Employee Acknowledges Evaluation**
  - By May 24

- **Manager Acknowledges**
  - By May 31

Dates are guides to facilitate the May 31st completion date. The timeline can be accelerated as needed. More time needed in the event of low performance.
Considerations

• Confirm:
  - Reporting Relationships and Supervisor Organization
  - Position Restrictions on Qualifications tab

• Dates are guides to facilitate the May 31st completion date

• The timeline can be accelerated or delayed as needed

• More time needed in the event of low performance
Important Points and Tips
Confirm Managers and Subordinates in Workday

- Edit
- Additional Manager

Self-Evaluation, Additional Manager, and Additional Reviewer are optional; but, **action is required – must be completed before Manager can draft evaluation**

Additional Manager and Reviewer can submit up until the Manager’s final acknowledgement

Managers – **Do NOT click Submit** until after conversation with employee
TAMU Specific Training
ILT and WebEx

TAMU Specific Job Aids
(including list of Talent Analyst and who has which template)

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