Employee Performance Review

Self Evaluation - Staff
Self Evaluation

Self evaluation is a good practice to reflect on accomplishments, what went well, what could have gone better, and what one may have learned over the past year.

Employees should check with their Manager if a self evaluation is required or not.

Even if the supervisor does not require the self evaluation, employees must submit a self evaluation (even with no information entered).
Find the Self Evaluation item in the Workday Inbox.
The evaluation may be completed in one of two ways:

1. **Guided Editor**
   A step-by-step guide through each section

2. **Summary Editor**
   Displays every section on a single page

For this example, we will be using the Guided Editor.
The first section is Attachments.

Note: An attachment is not required.

If you choose to attach a document:
Click Add

If you have no attachments, or wish to add them later:
Click Next
Self Evaluation: Attachments

To select a file to attach:
Click Attach
Self Evaluation: Attachments

Browse and select the file to attach: Click Open
Self Evaluation: Attachments

1. Enter a **Comment** (optional) explaining the attachment
2. Click the checkmark when done
To add another file: Click **Add** and continue the process.
After adding attachments:
Click **Next**
to move to the Goals page
If you previously entered Goals in Workday, they will auto-populate into the Goals page.

For each Goal:
Click the pencil icon to edit

Note: If Goals were not added before Performance Management was launched, they should be added outside the Performance Review process in order to maintain historical records. Please follow the Adding Goals After Performance Management Launch guide.
Self Evaluation: Goals

1. Enter the **Status**
   - Discontinued
   - Not Started
   - In Progress
   - Complete

2. If **Complete** is selected for Status, enter the **Completed On** date
For each Goal (continued):

1. Select a **Rating**
   - Significantly Exceeds Expectations
   - Exceeds Expectations
   - Meets Expectations
   - Partially Meets Expectations
   - Does Not Meet Expectations
   - Not Applicable

2. Add a **Comment** (optional)
Self Evaluation: Goals

When you are finished with the Goals page:
Click **Next**
to move to the Competencies page.
Self Evaluation: Competencies

A description of each Competency is provided, with examples.

The Competencies are:
- Service
- Teamwork/Collaboration
- Diversity & Respect
- Initiative
- Accountability
For each Competency:
1. Click the pencil icon to edit
2. Enter a **Rating** and a **Comment**
Self Evaluation: Competencies

Competencies

Description
Promotes a culture of service. Examples of behaviors might include:
- Responds appropriately to the needs of internal and external customers.
- Seeks to assure positive interpersonal relations.
- Conveys instructions, ideas, and information clearly.
- Follows through on commitments to others.
- Represents one's position, work unit and organization both internally and externally professionally and responsibly.
- Anticipates needs or problems and acts to meet or resolve responsibly, efficiently and cost-effectively.

For research focused positions, examples of behaviors include:
- Works to create and sustain a measurable, high standard of quality in research.
- Facilitates relationship with sponsors in ways that project respect, understanding and professionalism and strengthen the research program.
- Meets frequently and communicates openly to assure sponsor’s needs are identified and satisfied.
- Works to develop sustainable initiatives with academic sector or partners.

Employee Evaluation

Rating
Meets Expectations

Comment
During this review period, I provided excellent customer service while maintaining a friendly and respectful demeanor.

Click Next to move to the Supervisory Competencies page.
The Supervisory Competencies are:

- Supervision
- Organizational Leadership

**Supervision**

**Description**
Manages performance and cultivates a positive work environment. Examples of behaviors might include:

- Promotes employee excellence by establishing appropriate performance goals and assignments, providing coaching, feedback, and support, and rewarding high performance.
- Provides clear direction and communicates expectations.
- Manages employee performance issues.
- Promotes employee well-being.
- Supports employee growth by assisting with career plans and providing opportunities for professional development.
- Promotes collaboration and teamwork within work unit.

**Employee Evaluation**

**Rating**

**Comment**
Self Evaluation:
Supervisory Competencies

If an employee is not a supervisor, they can leave it blank or

**Rating:** Select **Not Applicable**

**Comment:** provide a brief reason

Click **Next** to move to the Responsibilities page
Self Evaluation: Responsibilities

The Responsibilities are auto-populated from the Position Restrictions.

For each Responsibility:
1. Click the pencil icon to edit
2. Enter a Rating and a Comment
Self Evaluation: Responsibilities

When you are finished with the Responsibilities page:
Click **Next**
to move to the Certification Question page
Self Evaluation: Certification Question

Certification Question

“Is Employee past due on any assigned required employee training courses?”

The ideal answer is No. If you are past due – go take your training!
1. Click the pencil icon to edit
2. Enter a Rating and a Response
3. Click Next to move to the Summary Editor
The Summary view is the same as using Summary Editor instead of the Step-by-Step. This gives you a chance to review your self evaluation.

A. Click **Save for Later**, to enter more information later

B. Click **Submit** to complete your self evaluation

Note: Once you click Submit, you cannot make any changes unless your Manager uses the Send Back option in the Manager Evaluation.
Congratulations!

You have successfully submitted your self evaluation.  
Don’t forget to click Done.

Up next is your Manager.