Workday Annual Performance Review
FY 20
Agenda

Welcome
What is the Same
What has Changed
Process and Timeline
Important Points and Tips
Support
Performance evaluation typically has a negative reception. Consider the positive aspects.
What is the Same
Rating Scale

Templates

Process & Steps
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.
As of Last Year...
Upload Attachments

Can upload attachments on the Self Evaluation template

Overall Rating

Overall rating visible when employee acknowledges evaluation
## Status Reporting

### Performance Review Process (All)

<table>
<thead>
<tr>
<th>Employee Type</th>
<th>Worker</th>
<th>Employee ID</th>
<th>Email - Work</th>
<th>Manager</th>
<th>Manager's Email</th>
<th>Supervisory Organization</th>
<th>Current State</th>
<th>Status</th>
<th>Date and Time Initiated</th>
<th>Review Template</th>
<th>Overall Rating - Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff</td>
<td>(Virtual) Jessica Batchelor</td>
<td>999900003</td>
<td><a href="mailto:Virtual.Jessika@gmail.com">Virtual.Jessika@gmail.com</a></td>
<td>(Virtual) Faye Scott</td>
<td><a href="mailto:Virtual.Faye@gmail.com">Virtual.Faye@gmail.com</a></td>
<td>02999990 TAMU WU Office of the President (Virtual) Faye Scott</td>
<td>Complete Self Evaluation for Performance Review Get Additional Manager Evaluation</td>
<td>In Progress</td>
<td>03/16/2020 12:24:37.035 PM</td>
<td>Annual Staff Performance Review (Self Evaluation) V2</td>
<td></td>
</tr>
<tr>
<td>Staff</td>
<td>(Virtual) Chance Kincaid</td>
<td>999900195</td>
<td><a href="mailto:Virtual.Chance@gmail.com">Virtual.Chance@gmail.com</a></td>
<td>(Virtual) Jessika Batchelor</td>
<td><a href="mailto:Virtual.Jessika@gmail.com">Virtual.Jessika@gmail.com</a></td>
<td>02999990 TAMU WU Administrative Services (Virtual) Jessika Batchelor</td>
<td>Complete Self Evaluation for Performance Review Get Additional Manager Evaluation</td>
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</tbody>
</table>
What has Changed
Deadline Extension

In consideration of Covid-19 disruptions, the deadline to complete annual performance reviews in Workday has been extended from May 31st to June 30th.

Development Items

Can add development items such as completed or desired certifications, degrees, courses, job interests.
Process and Steps
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.

Manager Drafts Evaluation

Manager receives an *Inbox task* to add additional manager AND reviewer to an employee’s evaluation.

- Additional manager ➔ can add comments to ALL sections of the evaluation.
- Additional reviewer ➔ can add ratings and comments in the competencies section of the evaluation.

* 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 Adds Additional Manager and Reviewers

Employee Self-Evaluation

Manager receives an *Inbox tasks* to add additional manager AND reviewer to an employee’s evaluation.

- Additional manager ➔ can add comments to ALL sections of the evaluation.
- Additional reviewer ➔ can add ratings and comments in the competencies section of the evaluation.

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

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.

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

Enter Goals in Workday

Performance review period launched 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.

Enter Goals in Workday

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

Employee receives an Inbox task to acknowledge the evaluation review.

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.

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 & Employee Discuss Evaluation

Manager Submits Evaluation

Employee Acknowledges Evaluation

Manager Acknowledges
Timeline
Dates are guides to facilitate the June 30th completion date.

The timeline can be accelerated as needed.

More time needed in the event of low performance.
Considerations

• Dates are guides to facilitate the June 30th completion date
• The timeline can be accelerated or delayed as needed.
• More time needed in the event of low performance
Important Points and Tips
Complete or Cancel Outstanding Evaluations – send Cancelation requests to HRevaluations@tamu.edu

Self-Evaluation, Additional Manager, and Additional Reviewer are optional; but, action is required
- Self-Evaluation initiates process
- Additional Manager and Reviewer continues the review process

Once Supervisor drafts evaluation, Additional Manager and Reviewer cannot be submitted

Managers – Do NOT click Submit until after having the conversation with employee
One Part

Plan - Establish performance and behavioral expectations

Reward - Recognize and reward performance

Coach - Provide feedback, training, resources, and support

Evaluate - Prepare and conduct performance evaluation

Performance Management Process

Plan

Reward

Coach

Evaluate
SMART Goals

• Differentiate between job duties and goals
  • “Responsible for organizing meetings”
  • “Design and propose to leadership by December 1st the program for the innovation conference.”
  • “Handle customer inquiries.”
  • “Develop a system to consolidate inquiries, conduct analysis, and report observable trends determined by theme(s) and frequency by March 31st.”

• Write SMART goals
  • Specific - states what the result will be.
  • Measurable – determine metrics.
  • Attainable – the time is sufficient to meet the goal.
  • Relevant – employee knows why this goal is important for business.
  • Time bound – determine completion date.
Resources
TAMU Specific Training
Zoom only in consideration of COVID-19

TAMU Specific Job Aids

Visit…
PerformanceManagement.tamu.edu