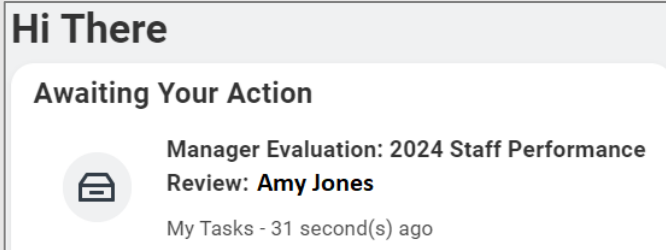


Introduction

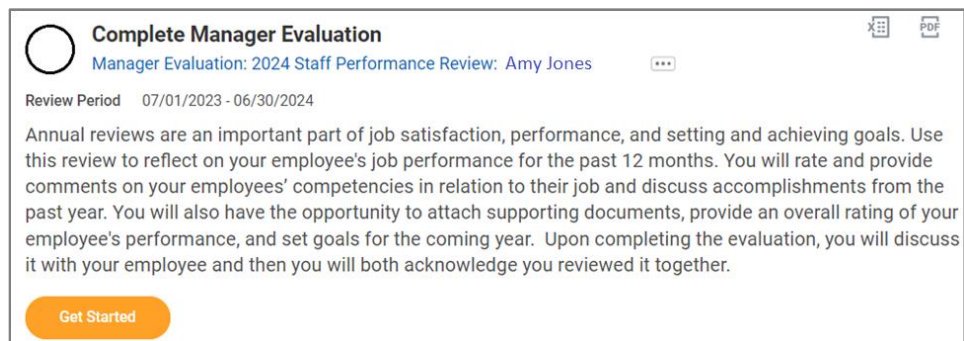
The review period spans July 1 through June 30 each year. Performance Reviews are due to be completed by July 31. For additional resources please reference the [Performance Review Manager Guide](#) or contact Human Resources at hr@willamette.edu.

Step 1: Accessing the Performance Review

1. You will receive a message in your Workday Inbox prompting you to access the review form.



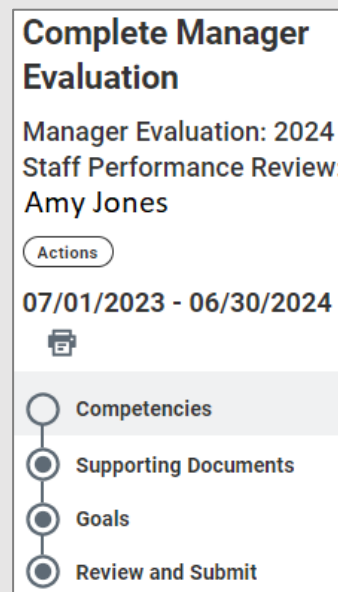
2. Review the introduction, then click **Get Started** to launch the review.



3. The review is comprised of four sections:

- Competencies
- Supporting Documents
- Goals
- Review and Submit

You can navigate through the form by using the Next buttons at the bottom of each section. You can also use the menu on the left of the form, clicking on the section you wish to view.



Step 2: Completing the Review Form

2.1 Completing Competency Rating and Comments

1. There are five staff general competencies that apply to all employees: Job Knowledge, Productivity, Quality of Work, Communication/Interpersonal Skills, and Problem Solving. Managers have an additional four competencies: Decision Making, Management of Human Resources, Stewardship, and Planning and Coordination.

Competency	Description	Manager Evaluation
Job Knowledge	<ul style="list-style-type: none"> • Demonstrates knowledge of job requirements, skills, techniques, and principles, and applies this knowledge to successfully perform job duties. • Keeps current on changes in technical knowledge needed to perform the role. • Expands knowledge of the job and how it interacts with other positions, enhancing the function of the position and the department over time. 	<p>Proficiency Rating</p> <input type="text"/> <p>Comment</p> <input type="text"/>


Each competency is listed in the left-hand column, followed by a description of it. The third column has a field to enter a rating and a space to write comments to support the rating given.

2. To enter a rating for each competency, click in the Proficiency Rating field and select the rating from the resulting list.

Comments can be entered in the comment box. If you wish to add some formatting to the text, click the **Format Text** button.

Please note as specified in the Performance Review Manager Guide, you will be required to enter detail in the comments section.

3. Repeat this process for all the competencies in the form. The summary section at the bottom of the page will show a calculated overall rating based on your selections from the Proficiency Rating drop-down menus.

When done entering ratings and comments, click the  button.

If desired, you may enter additional summary comments.

Manager Summary

Calculated Proficiency Rating: Meets Expectations (Rounded from 3.22)

Proficiency Rating Description: Capable, satisfactory performance that consistently meets and occasionally exceeds job requirements.

Comment:

2.2 Adding Supporting Documents

To add supporting documents, such as self-evaluations, feedback from coworkers, or a list of achievements, either drag and drop the files into the gray field or click **Select Files** to search for and attach the desired documents.

When done, click  to continue.

Supporting Documents

Use this section to attach relevant supporting documents, such as self-evaluations, feedback from co-workers, or a list of additional accomplishments.

Manager

Drop files here

or

[Select files](#)

2.3 Add Goals

- The next section allows you to record specific goals for the next review cycle. To create a goal, click the **Add** button.

Goals

Use this section to document goals for the forthcoming review period. Enter the goal and a description of the actions needed to reach the goal. The description section can also include metrics that need to be reached to accomplish the goal.

[Add](#)

- A goals section will open. Place the goal statement in the Goal field and as desired describe the goal in more detail in the Description section. If desired, add a due date for the goal completion. Disregard the Status drop down, it is not functional at this time. If desired, additional comments about the goal can be listed in the Manager Comment section.

Goal *

Description

Due Date

Status

Manager

Comment

[Remove](#)

[Add](#)

Click **Add** to insert another goal.

- Click  when all desired goals have been entered.

Step 3: Submission to HR and Employee Review

3.1 Submit for Human Resources Review

1. You will be presented with a view of the entire review. Read it over carefully.

If you find areas that need to be corrected or modified, click on the section navigation to the left of the review. Make the needed changes and then click **Review and Submit** again.

Complete Manager Evaluation

Manager Evaluation: 2024
Staff Performance Review:
Amy Jones


Actions

07/01/2023 - 06/30/2024



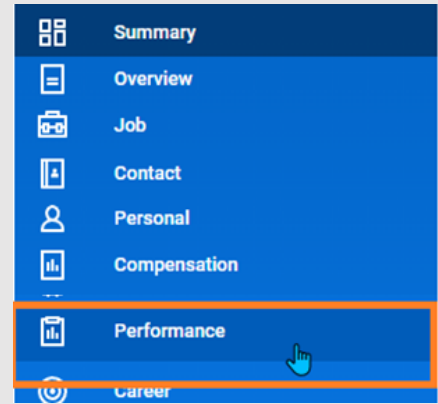
- Competencies
- Supporting Documents
- Goals

Review and Submit

2. When you are satisfied with the review, click the  button
3. The performance review will be sent to Human Resources to be read and approved. HR will send the review back to you which will generate a task in Workday. The message will either:
 - Confirm you can proceed with presenting the review to the employee. Move to step 3.2.
 - Inform you the review needs revision in order to meet quality standards. An email will be sent separately providing revision suggestions.

3.2 Print the Review and Present to the Employee

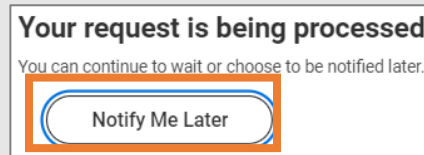
1. After HR sends the review back with approval to proceed, you may present the review to the employee. To start, enter the employee name in the search field. Once reaching their profile summary page, scroll down the left-hand navigation and select Performance. **Note: Do not respond to the task in your Workday Inbox until you have met with the employee.**



2. Locate the most recent review and click the **Create New PDF** button.

Review	Review Period Start Date	Review Period End Date	Status	Awaiting	View Review	Create Review PDF
2024 Staff Performance Review: Amy Jones	01/01/2024	06/30/2024	Provide Employee Review Comments	Andrea Anderson	<button>View</button>	<button>Create New PDF</button>

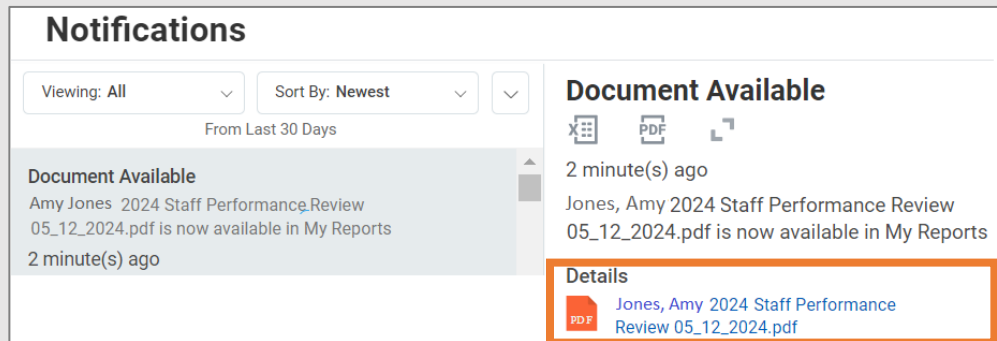
3. You will receive a notice that your request is being processed. Click **Notify Me Later**.



4. After a moment, click on the notification icon in the upper right-hand corner of the screen.



6. From the list of notifications click on the Document Available item, then click on the PDF link within it.

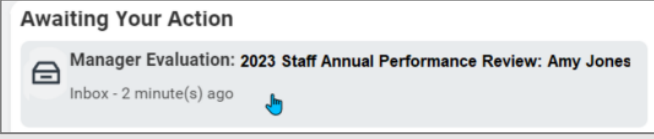




7. A copy of the review will appear. In the upper right corner, click the download icon to download the PDF and send it to the employee electronically. Click the print icon to create a paper copy of the review that can be given to the employee.

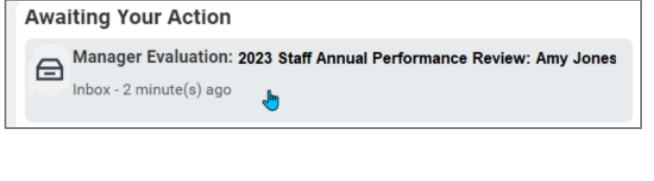


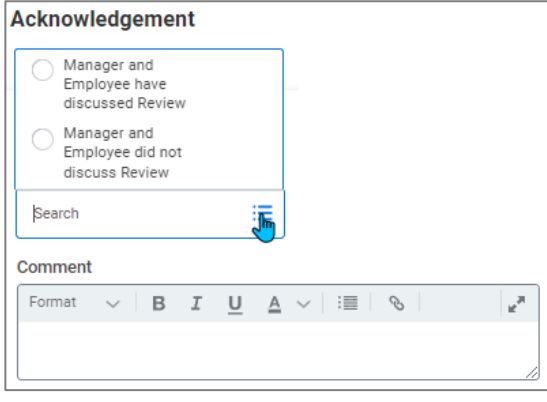


Performance Review Instructions

3.3 Send Review Back to Human Resources

<p>1. After you have discussed the review with your employee, go back to your inbox in Workday and click on the Manager Evaluation task.</p>	
<p>2. Go to the left-hand navigation and select the Review and Submit section.</p> <p>Click  on the bottom of the screen.</p>	

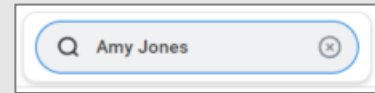
3.4 Employee and Manager Acknowledgement

<p>1. Human Resources will submit the review, triggering a task in Workday for employees to acknowledge they have met with their supervisor to discuss it. The employee may also add comments as desired.</p>	
<p>2. Once the employee has acknowledged the review delivery, a task will appear in Workday for you to also acknowledge the review delivery. Clicking on the task will present a copy of the review.</p>	
<p>2. Click  the bottom of the screen to bring you to the acknowledgement screen.</p>	
<p>3. Click in the Status field and select the first choice, Manager and Employee have discussed Review.</p> <p>Enter any additional comments in the Comments field and click .</p>	
<p>4. The review will go back to HR for one final check and approval to complete the process.</p>	

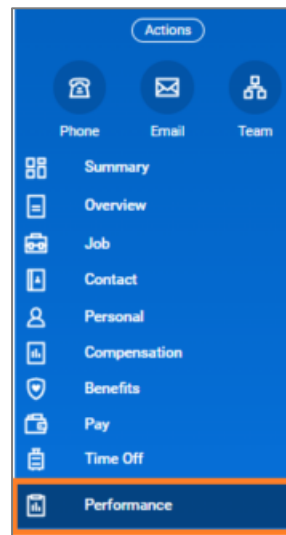
Appendix

Accessing Completed Performance Reviews

1. There may be times you wish to review a recently delivered or historical performance review. To access the reviews, first enter the employee's name in the Search field.



2. In the left-hand navigation, scroll down to Performance and select it.




3. A list of performance reviews will be visible. Click on the desired review to view it.

Printing the Goals or Other Sections for Review

1. There may be times when you wish to print individual sections of the review. Printing the goals section could be particularly useful to review and update progress with the employee periodically.

2. To do so, follow the same process described above to access the performance review.

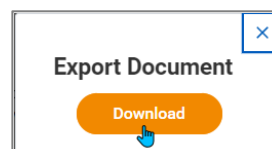
3. Click the  button to the right of the review you wish to see.

4. In the left-hand navigation, click the last section, Summary.



5. You will be presented with the review broken into sections. Go to the section you wish and click the PDF icon in the upper right corner.

6. You will be prompted to Download the section.



Student Worker Supervision Instructions

There are instances when an employee who does not manage other staff will supervise student employees. This section describes how to document this work properly within the performance review.

Situation 1: Student Worker Supervision Listed in Job Description Duties

If supervision of student workers is listed as a duty within the job description, then contact Human Resources to have a Manager review assigned to the worker. Complete the Managers Human Resources competency section. The other sections, Decision Making, Stewardship, and Planning and Coordination can be rated as **Not Applicable**.

Situation 2: Student Worker Supervision is Not Listed in Job Description Duties

In this situation, you may enter that the worker manages student employees in the comment section at the bottom of the competencies section. You can also include comments in applicable competencies. For example, in the Communications/Interpersonal Skills competency, comments regarding the employee's communications with students can be included.