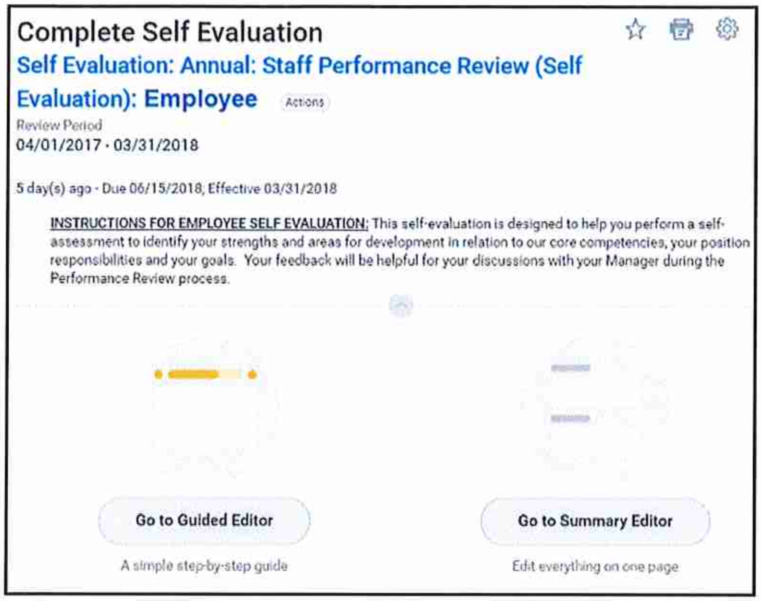
DIRECTIONS FOR:
COMPLETE PERFORMANCE REVIEW (Staff with Self Evaluation)

Your performance review template has been launched in your Workday Inbox.

Please follow the steps below to complete your Self Evaluation.

1. Click the "Self-Evaluation (Employee) action item in your inbox.



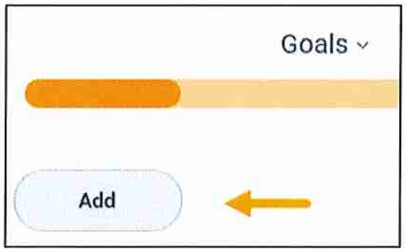
2. You can complete the self-evaluation in one of two ways:
   - **Guided Editor**: Use a simple step-by-step guide **(complete all comments – Save for Later at end of evaluation)**
   - **Summary Editor:** Edit all sections using a one-page view **(can use Save for Later at any time to complete process)**

   Note: This job aid will take you through the perspective of using the Guided Editor

3. You have the option to add attachments relevant to the performance review. Attachments can be added at the beginning of the form as shown below. Attachments should be within the evaluation cycle (April 1, 2018 – March 31, 2019)

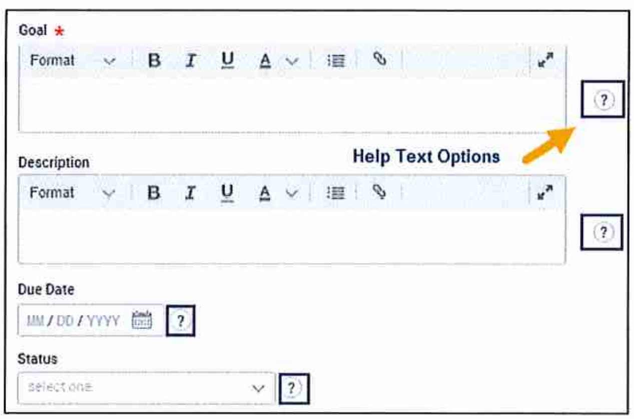
1. Click **Go to Guided Editor**

   IMPORTANT: The Performance Review may not contain prepopulated goals for all employees, so you may see a blank screen with an **Add** button



2. The following message also displays:

Note: If you select **Show Me**, fields will appear to review / enter goal information with question mark icons. Click the icon for further information about the field

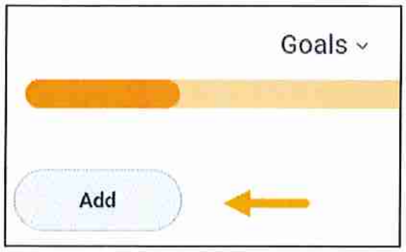


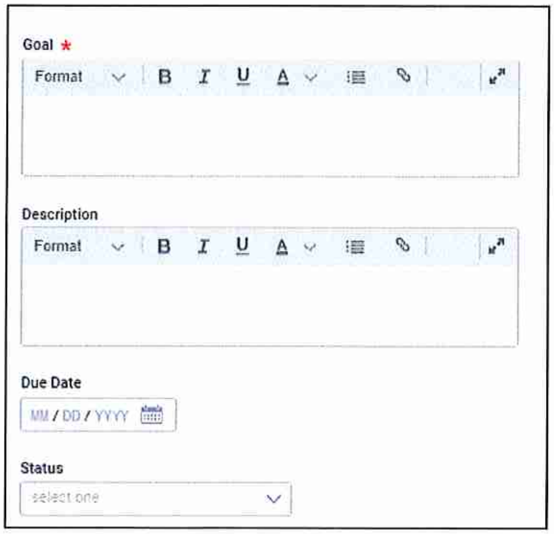
Below is an example of what the help text looks like when you click on the icon

3. If you prefer not to have Help Text available, click the "X" and close out of the message

Rate Yourself on Goals

4. Begin your Self Evaluation by clicking **Add** if your Goals **are not prepopulated**





You will then see the following without the added Help Text icons:

***Note that the fields are the same**

5. Review prepopulated goals ***or*** enter goals and relevant information including:

   Goal. Recommendation: Goals should be written in measurable form to help determine the extent to which they have been met (e.g. Employee will complete three professional development opportunities)

   Description. This field can include more detailed information on what the employee will do to meet the goal as well as what resources may be needed to meet the goal

   Due Date. This is the date by which the employee is expected to have met the goal

   Status. This is your current status on meeting this goal. Options include: Discontinued, Not Started, In Progress and Complete

   Rating. This is your evaluation of yourself on this goal. Options include: Does not meet Expectations, Partially Meets Expectations, Meets Expectations, Exceeds Expectations, and Significantly Exceeds Expectations

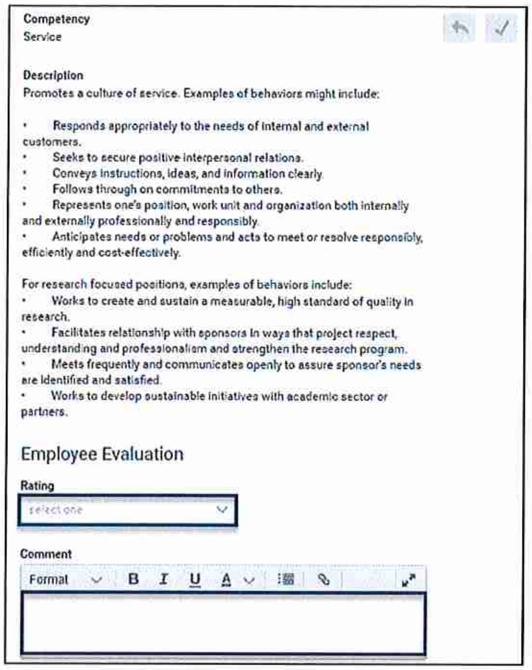
   Comments. Enter comments for your manager to support your rating. This can help your manager have information of which they may not be aware.

   <u>Note</u>: *Prepopulated information should not be edited without prior discussion with your manager*

6. Click **Next** after completing the information described above for all goals

Rate Yourself on Competencies

7. On the **Competencies** page, click the Edit icon and enter **Rating** and **Comments** for each competency (e.g., Service, Teamwork / Collaboration, Diversity & Respect, Initiative and Accountability)



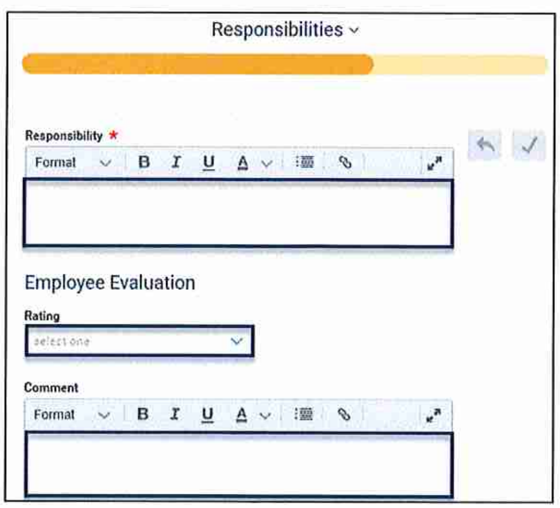
8. Click **Next**

Rate Yourself on Supervisory Competencies (if applicable)

9. Enter ratings for **Supervisory Competencies** (e.g., Supervision and Organizational Leadership), if needed

Rate Yourself on Responsibilities

10. Enter ratings for **Responsibilities**

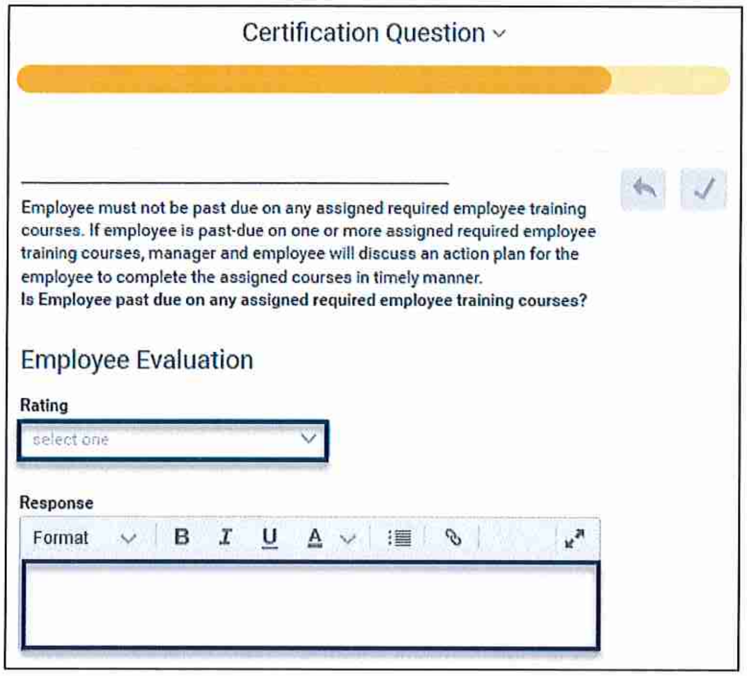


<u>Note</u>: Responsibilities should be prepopulated from the position restrictions. If not, please contact your Manager for assistance

11. Click **Next**

Answer the Certification Question

12. On the **Certification Question** page, answer the question, "Is Employee past due on any assigned required Employee training courses"? Select "Yes" or "No" in the **Rating** field



13. Click **Next** to see the summary of all the details entered

14. Review the information and click **Submit**

15. Click **Done**

The Manager will complete the evaluation of the Employee.

If you do not have an Annual Performance Review in your Workday Inbox please email Patti Morgan at Patricia.Morgan@tamusa.edu.