

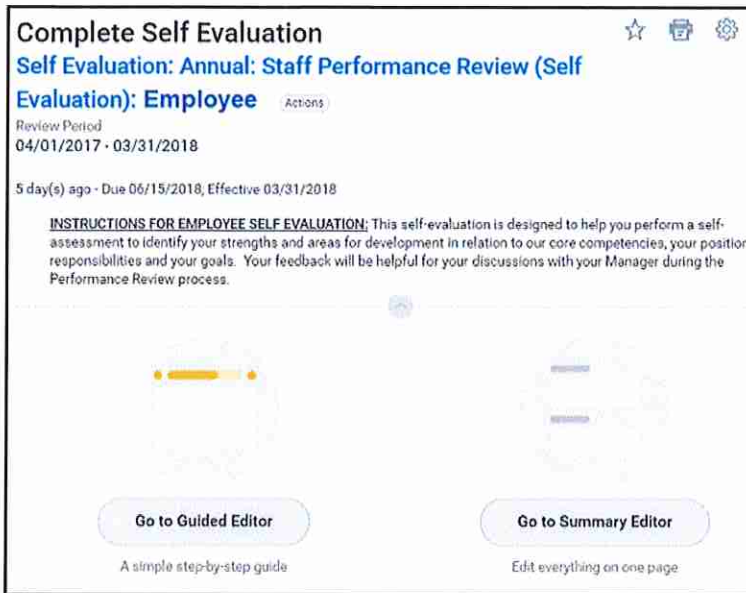
## DIRECTIONS FOR:

### ***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.



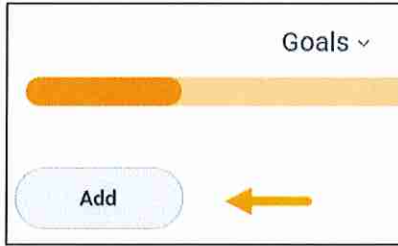
2. You can complete the self-evaluation in one of two ways:
  - **Guided Editor:** Use a simple step-by-step guide (**complete all comments – Save for Later at end of evaluation**)
  - **Summary Editor:** Edit all sections using a one-page view (**can use Save for Later at any time to complete process**)

**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**

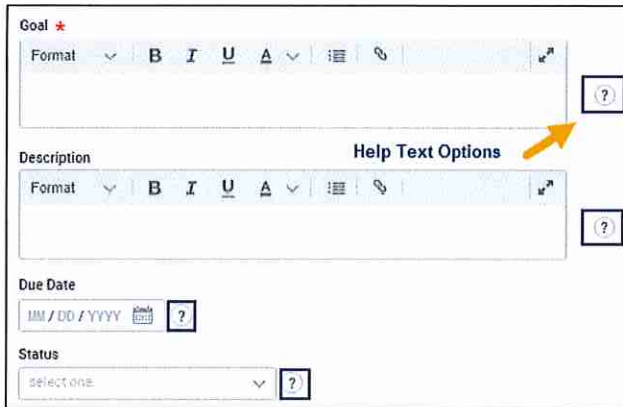
**IMPORTANT:** The Performance Review may not contain prepopulated goals for all employees, so you may see a blank screen with an **Add** button



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



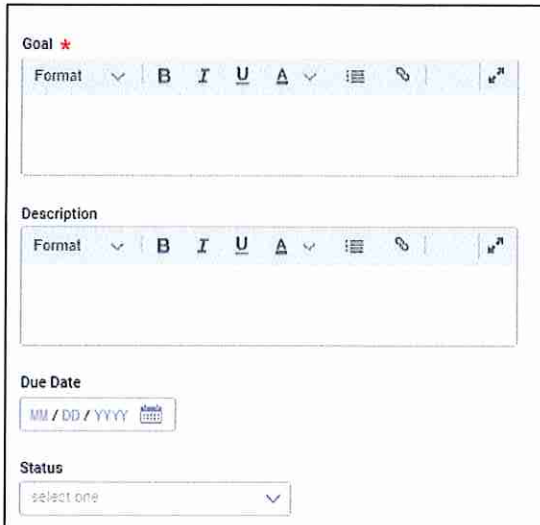
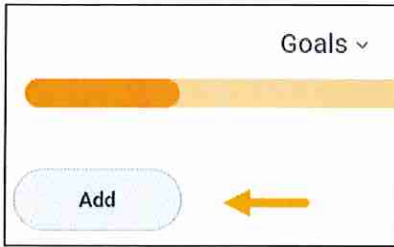
Below is an example of what the help text looks like when you click on the icon



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**

A screenshot of a form for adding a goal. The form has four main sections: 1. 'Goal' with a red asterisk, a 'Format' dropdown, and a rich text editor toolbar (bold, italic, underline, text color, list, link, unlink, undo, redo). 2. 'Description' with a 'Format' dropdown and a rich text editor toolbar. 3. 'Due Date' with a date input field showing 'MM/DD/YYYY' and a calendar icon. 4. 'Status' with a dropdown menu showing 'select one'.

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

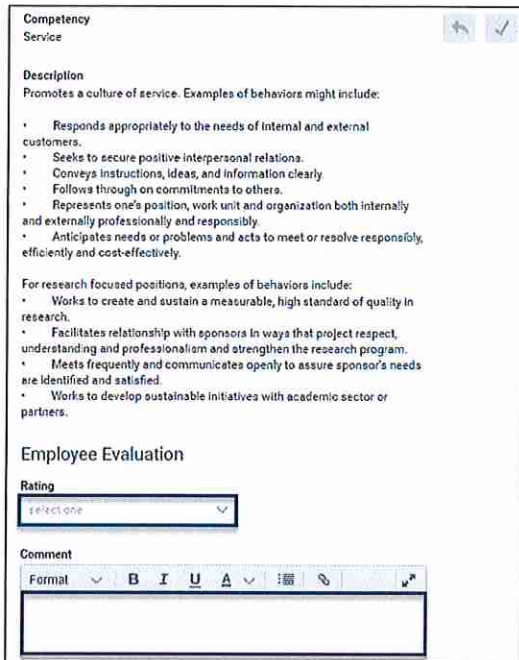
**Comments.** Enter comments for your manager to support your rating. This can help your manager have information of which they may not be aware.

**Note:** *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)



The screenshot shows a form for evaluating the 'Service' competency. It includes a description of the competency, a list of behaviors, and a section for employee evaluation with a rating dropdown and a comment text area.

**Competency**  
Service

**Description**  
Promotes a culture of service. Examples of behaviors might include:

- Responds appropriately to the needs of internal and external customers.
- Seeks to secure 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**  
select one

**Comment**

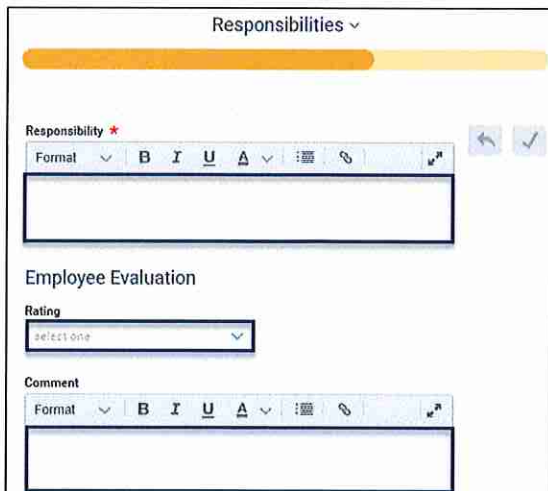
8. Click **Next**

## 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**



The screenshot shows a form for evaluating 'Responsibilities'. It includes a title bar, a 'Responsibility' field with a rich text editor, and an 'Employee Evaluation' section with a rating dropdown and a comment text area.

**Responsibilities**

**Responsibility \***

**Employee Evaluation**

**Rating**  
select one

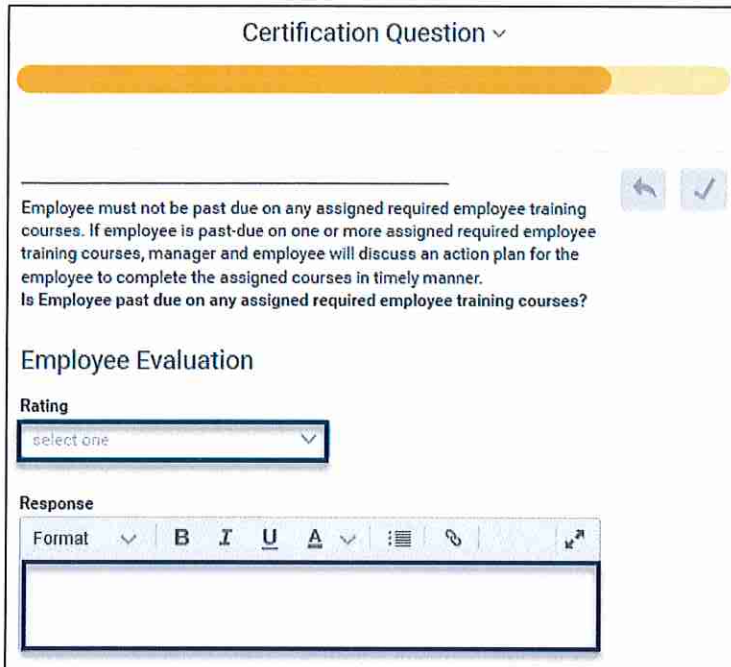
**Comment**

**Note:** 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



The screenshot shows a form titled "Certification Question" with a dropdown arrow. Below the title is a yellow progress bar. The main text of the question reads: "Employee must not be past due on any assigned required employee training courses. If employee is past-due on one or more assigned required employee training courses, manager and employee will discuss an action plan for the employee to complete the assigned courses in timely manner. Is Employee past due on any assigned required employee training courses?". To the right of the text are two small icons: a left-pointing arrow and a checkmark. Below the question is the "Employee Evaluation" section, which includes a "Rating" dropdown menu currently set to "select one" and a "Response" text area with a rich text editor toolbar containing options for Format, Bold (B), Italic (I), Underline (U), Text Color (A), Bulleted List, Link, and Unlink.

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](mailto:Patricia.Morgan@tamusa.edu).