How to Complete Your Staff’s Performance Review—Managers Guide

**Getting Started:** Log into Workday. This screenshot shows the Workday homepage once you log in.

---

**Your Inbox:** Click on your name/picture in the upper right corner of the homepage. On the drop down menu, select the “Inbox” tab.

---

Once your staff member has completed a self-evaluation, you will receive an action item to complete your employee’s annual review. Select the “Performance Cycle: Annual Review – Staff Non-Manager...” task.

Ensure you choose the task associated with the appropriate employee.

**Note:** you cannot complete the manager evaluation until your employee has completed the self-evaluation.
Get Feedback (Optional): This optional function allows you to solicit feedback and insight from anyone in the university who may have worked with the employee you are evaluating.

Note: this is the ONLY time to request feedback. If skipped, there is no other opportunity to request this. If you are certain you wish to skip this, go to page 3.

Show who gave feedback: checking this box will allow the employee to see who provided the feedback. If you do NOT check this box, the feedback will appear as anonymous.

Do not share with employee: checking this box will hide all feedback from the employee being reviewed.

Questions: Select the “add” button to input as many questions as desired. All questions will be viewable to all employees from whom you request feedback.

Samples of questions to ask when requesting feedback:

“Is the employee able to effectively resolve problems and convey accurate information to customers and/or relevant sources?”

“Are there areas of improvement that you would recommend for this employee that would help him/her accomplish work more effectively?”

“Is the employee able to approach the job with confidence and a positive attitude (e.g., respond to setbacks in a helpful and constructive manner)?”

“Does the employee build and maintain positive and constructive working relationships with others?”
If you wish to “skip” the feedback step, you will need to click on the gear icon found on the upper right corner. Select “Skip This Task.”

Select “OK” if you wish to proceed.

Or, select “Cancel” if you change your mind.

Manager Evaluation: To get to your manager evaluation, go to the upper right corner of the screen and select your name/picture to locate your “Inbox.”
From here, select the “Manager Evaluation: Performance Cycle Annual Review—Staff...” for the specific employee you wish to evaluate.

Next, choose which option to use to navigate through your performance review:

**Go to Guided Editor:** recommended for its step by step help

**Go to Summary Editor:** see everything at once

**Performance Criteria:** This page lists all 9 (Non-manager) or 11 (Manager) performance criteria that employees are rated against at the end of the year.

As you scroll down the page, select the “edit” icon on the far right (looks like a paper and pencil) in order to select your ratings per each criteria listed.
Select the prompt box:

Enter Ratings: From here, you will choose the appropriate (1-5) proficiency rating for each criteria.

You cannot manually enter ratings; you must select a rating from the drop down menu. *If a performance review is skipped, it will negatively impact the overall score*—so be sure to select an appropriate rating.

We strongly advise that if you select a rating of 1, 2, or 5, that you provide a full explanation. Note that if an overall rating of 1, 2 or 5 is entered, the performance evaluation will route to your HR Partner for additional review.

Once you've selected your rating, click “Done” and then “Save” in order to move on and rate the next criteria.
**Summary:** Once you’ve rated ALL criteria, you will be able to review your overall rating at the bottom of the page. Once you’ve reviewed and confirmed the accuracy of your overall rating, select “Next” to proceed.

**Review Goals:** Here is where you review your employee’s performance and development goals. You may add additional goals, if needed, or edit what was previously entered in Workday, if applicable.

You may also delete goals; however, you cannot delete goals if they are tied to in-progress and/or completed reviews. Deleted goals are removed from the goal library, not just this template. **Note:** goals are no longer retrievable once they are deleted.

Once you have reviewed both performance goals and development goals, select “Next.”
**Attach Supporting Documentation:** Here, you will be able to attach **supporting documents (this is optional):** you can upload training certificates, recognition, emails, etc. Files upload directly from your computer.

Once you’ve added documents or decided to skip this, you may select “Next.”

**Overall Rating:** Verify the **overall rating** is accurate, then click “Next.”

If overall rating does not appear correct or you need to go back to make edits or revise mistakes, click the “Back” button. Otherwise, select “Next.”

**Summary:** On the summary page, you have the following options:

- Click “Submit” when manager evaluation is in FINAL form.
- Click **Send Back** if you need to request the employee make changes.
- Click **Save for Later** if you are not completely finished or have questions for your employee. This option will save your review in its current form—is accessible any time via your Workday inbox.

Selecting “Close” will not save any work and will close out the template.
After clicking submit, you will see that you’ve successfully completed the manager evaluation.

If you determine you still need to make changes-edits to the evaluation, contact the HR Service Center at (213) 821-8100 or uschr@usc.edu.

When you revisit the one-on-one later you can find this in your Workday inbox, “Hold one-on-one performance review meeting”
Hold One-On-One Meeting:
When you complete the one-on-one meeting, provide any follow-up comments and click “Submit.”

What’s Next: Electronic Signature/Acknowledgment
Once you complete the one-on-one “to-do” task, this will route to the employee to provide additional review comments as well as electronically sign for their overall performance review. Once the employee completes this step, this will route back to you to add your review comments (if necessary) and also provide your electronic signature. Please follow the steps below to complete this process.

Getting Started: Log into Workday, and select your name/picture in the upper right corner of the screen.
From here, click the “Inbox” tab to review your inbox items.
Your Inbox: Choose the “Manager Evaluation Performance Cycle: Annual Review...” tab in your inbox.

Ensure you choose the task associated with the appropriate employee.

Acknowledgment Step: On this page, you will see the “Acknowledgment” manager feedback step. Select the “edit” icon on the far right corner in order to provide manager review comments if necessary, and electronically sign as acknowledgement.
Click on the prompt box:

Electronic Signature: Click inside the circle: “Electronic Signature Acknowledgement (Comments Optional).” Then click “Save.”
On this same page, you may also review both the manager and employee evaluation. Once you have reviewed, click “Submit.”

Congratulations! You’re done!