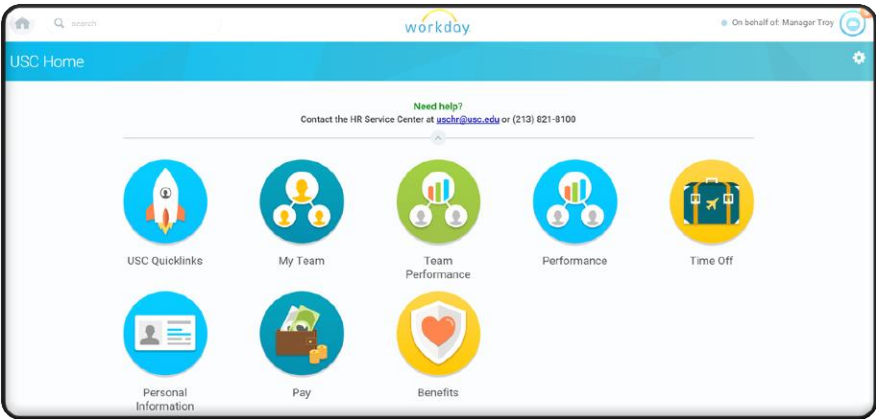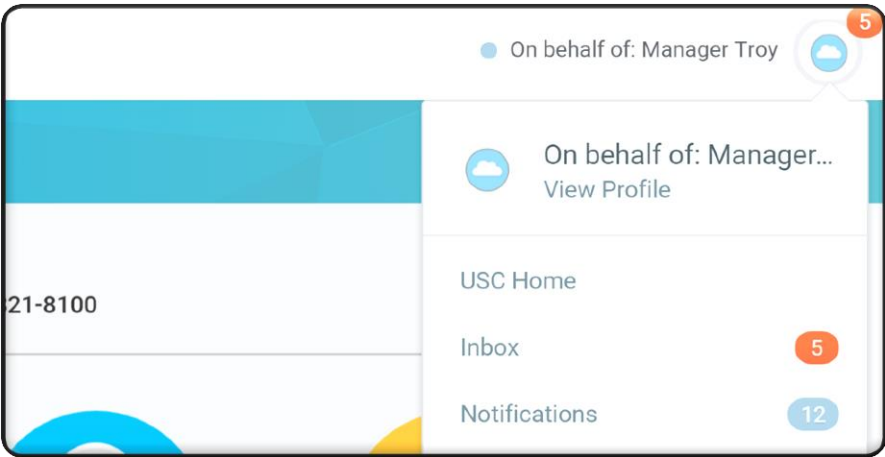# How to Complete Your Staff's Performance Review– Managers Guide

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.
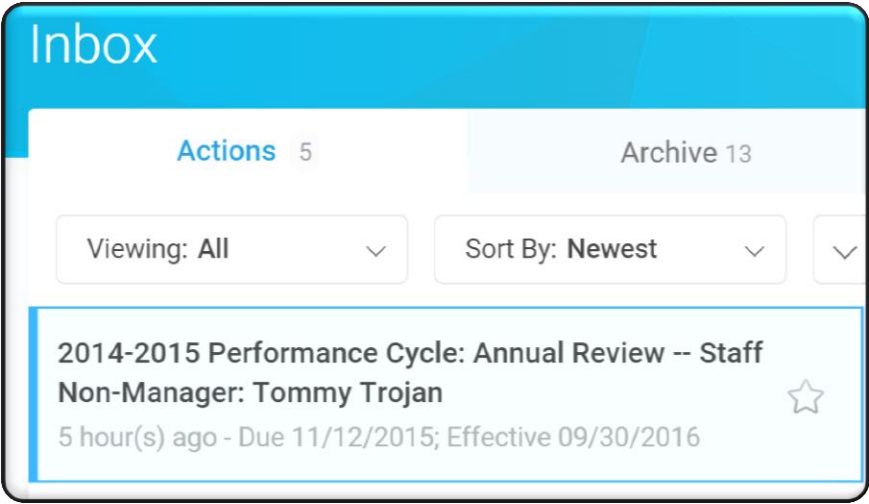
Get Feedback (Optional): This optional function allows you to solicit feedback and insight from anyone in the university who may have worked with the employee you are evaluating.

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**."
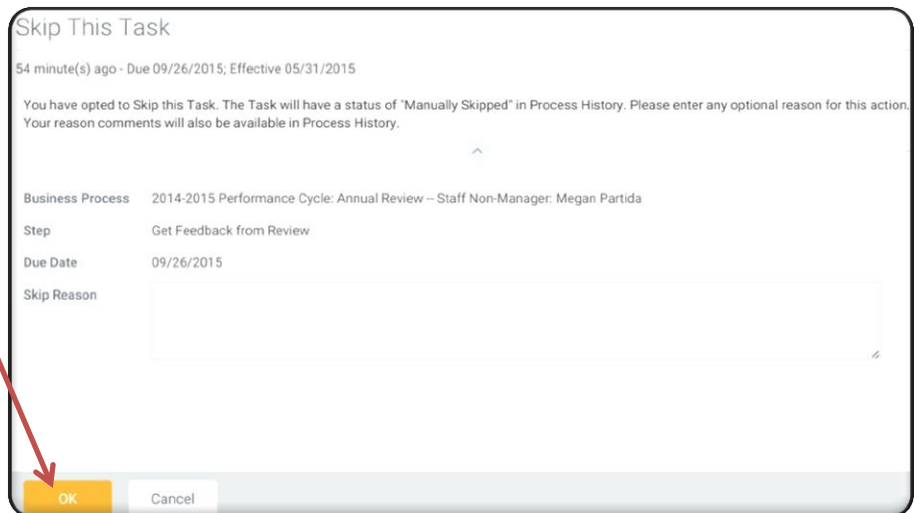
Reassign

Skip This Task

View Details
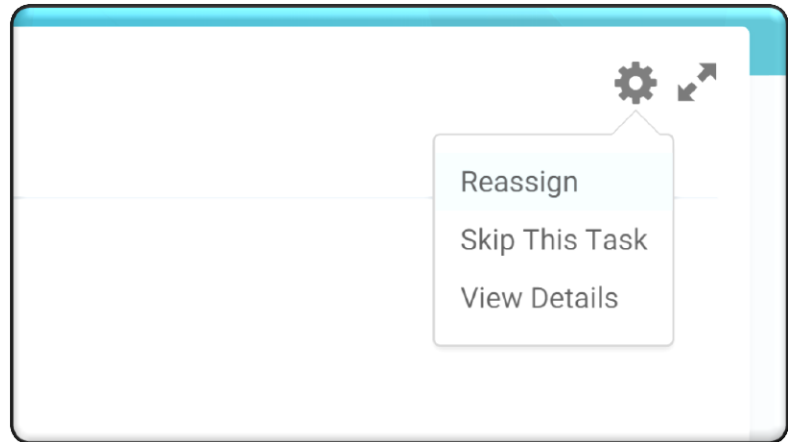
Select "**OK**" if you wish to proceed.

Or, select "**Cancel**" if you change your mind.

Skip This Task

54 minute(s) ago · Due 09/26/2015; Effective 05/31/2015

You have opted to Skip this Task. The Task will have a status of "Manually Skipped" in Process History. Please enter any optional reason for this action. Your reason comments will also be available in Process History.

Business Process	2014-2015 Performance Cycle: Annual Review -- Staff Non-Manager: Megan Partida
Step	Get Feedback from Review
Due Date	09/26/2015
Skip Reason	

OK   Cancel

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**."

● On behalf of: Manager Troy

On behalf of: Manager...
View Profile

USC Home

Inbox   5

Notifications   12

21-8100
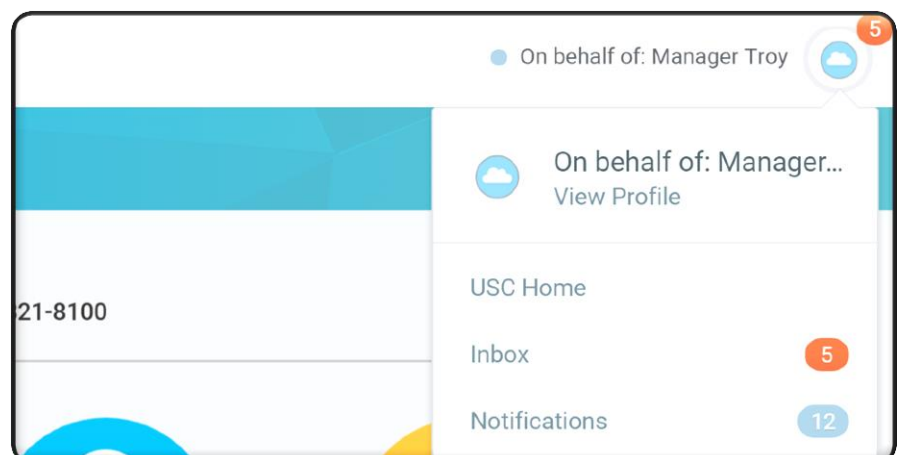
From here, select the "**Manager Evaluation: Performance Cycle Annual Review—Staff...**" for the specific employee you wish to evaluate.

Inbox

| Actions 5 | Archive 14 |

Viewing: **All**   Sort By: **Newest**

Manager Evaluation: 2014-2015 Performance Cycle:
Annual Review -- Staff Non-Manager: Tommy Trojan
7 second(s) ago - Due 11/05/2015; Effective 09/30/2016
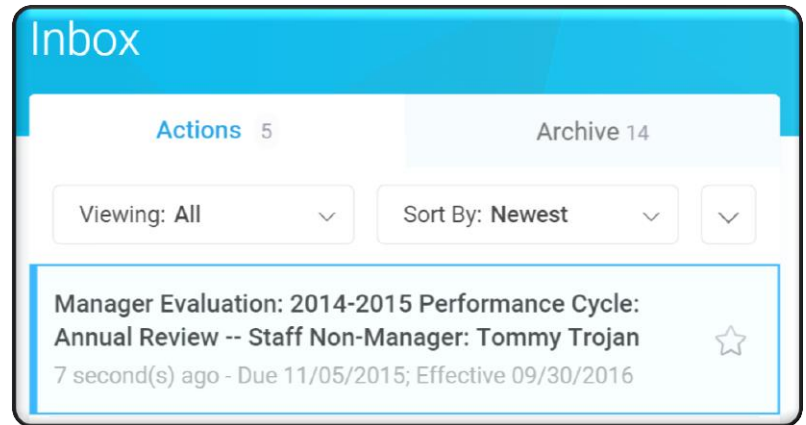
Next, choose which option to use to navigate through your performance review:

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

Go to Summary Editor: see everything at once

Go to Guided Editor

A simple step-by-step guide

Go to Summary Editor

Edit everything on one page

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.

Performance Criteria ⌄

Please rate your performance on each of the following Performance Criteria. Provide supporting comments and/or documentation.

Note: Be sure to review all behavioral indicators for each performance criterion so you can appropriately rate yourself. If a performance criterion is not relevant to your job function, you MUST select "Not Applicable." If you do not select "Not Applicable", your overall rating score will be negatively impacted.

To learn more about the performance criteria at USC, please view our educational video by clicking here. You can also enroll in the Performance Management curriculum in Trojan Learn to learn more about the evaluation process (Phase 4: EVALUATE).

Managers: Please rate your direct report's performance on each of the following Performance Criteria.

Criteria
A. Quality of Work

Definition
Produces results and/or provides services consistent with defined University standards for the position.

Behavioral Indicators:

* Demonstrates attention to detail and accuracy
* Produces work that is accurate, complete and of high quality
* Provides service that is responsive, courteous and respectful
* Seeks opportunities and takes action to improve skills and quality of work product and/or services
* Maintains a safe workplace for self and others

Select the prompt box:

Criteria
A. Quality of Work

Definition
Produces results and/or provides services consistent with defined Universit

Behavioral Indicators:

* Demonstrates attention to detail and accuracy
* Produces work that is accurate, complete and of high quality
* Provides service that is responsive, courteous and respectful
* Seeks opportunities and takes action to improve skills and quality of work
* Maintains a safe workplace for self and others

Manager Evaluation   Manager Level
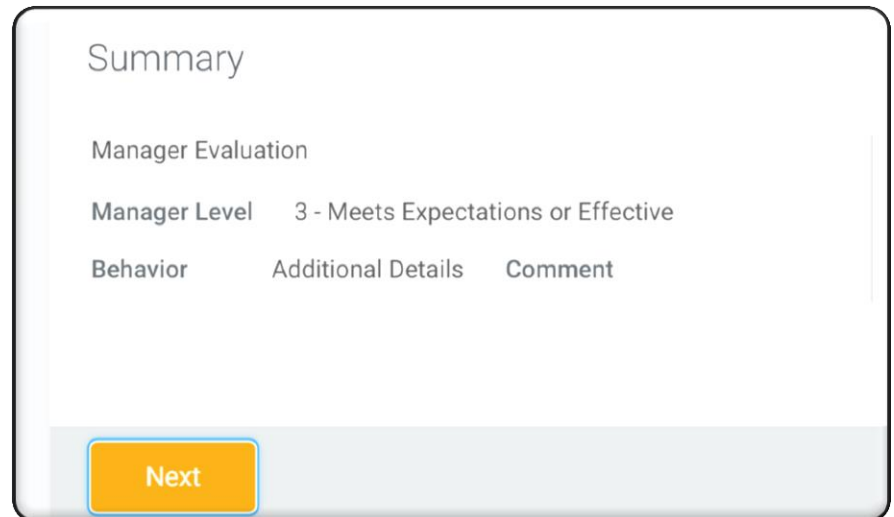
Manager Level

Behavior   (empty)   Behavior
                               (empty)
Comment

                               Done

Save   Cancel

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*.

Criteria   Select Proficiency Rating
A. Quality of Work
                                  ○ 5 - Exceeds
                                     Expectations or
Definition   Exceptional
Produces results and/or   Universi
                                  ○ 4 - Exceeds Most
Behavioral Indicators: Expectations or
                                     Commendable

* Demonstrates attention
* Produces work that is a   ○ 3 - Meets
* Provides service that is   Expectations or
* Seeks opportunities and   Effective   / of work
* Maintains a safe workpl

                                  ○ 2 - Meets Some
Manager Evaluation   Expectations or

Manager Level   search

Behavior   (empty)   Behavior

Comment   (empty)

                                  Done

Save   Cancel

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.

Summary

Manager Evaluation

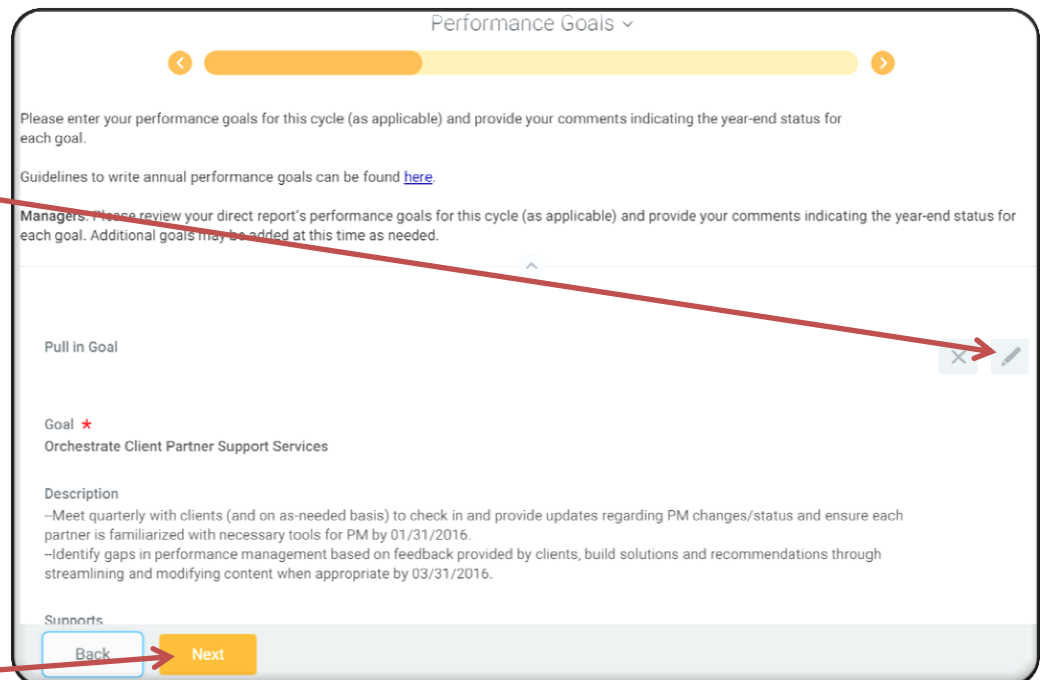Manager Level   3 - Meets Expectations or Effective

Behavior   Additional Details   Comment

Next

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**."

Performance Goals ˅

Please enter your performance goals for this cycle (as applicable) and provide your comments indicating the year-end status for each goal.

Guidelines to write annual performance goals can be found here.

Managers: Please review your direct report's performance goals for this cycle (as applicable) and provide your comments indicating the year-end status for each goal. Additional goals may be added at this time as needed.

Pull in Goal

Goal *
Orchestrate Client Partner Support Services

Description
--Meet quarterly with clients (and on as-needed basis) to check in and provide updates regarding PM changes/status and ensure each partner is familiarized with necessary tools for PM by 01/31/2016.
--Identify gaps in performance management based on feedback provided by clients, build solutions and recommendations through streamlining and modifying content when appropriate by 03/31/2016.

Supports

Back   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**."

Supporting Documents ⌄

Please upload any supporting documents you may have here.

Manager

Add

Back   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**."

Overall ⌄

This page displays your average performance rating for the current Performance Evaluation cycle. Additional summarizing c

Manager Evaluation

Rating   3 - Meets Expectations or Effective

Additional Details   Comment

Employee Evaluation

Rating   3 - Meets Expectations or Effective

Additional Details   Comment

Back   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.

enter your comment

Process History

Complete Manager Evaluation for Performance Review- Awaiting Action

Manager Troy   - Due 11/05/2015

Submit   Send Back   Save for Later   Close

After clicking submit, you will you 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.

Success! Event submitted **Manager Evaluation: 2014-2015 Annual Review -- Staff Non-Manager: Tommy Trojan** ···

22 second(s) ago - Due 11/05/2015; Effective 09/30/2016

Up Next

Manager Troy

Hold A One-On-One Performance Review Meeting With Employee

To Do

> Details and Process

When you revisit the one-on-one later you can find this in your Workday inbox, "**Hold one-on-one performance review meeting**"

Inbox

Actions 5   Archive 15

Viewing: **All**   ∨   Sort By: **Newest**   ∨   ∨

Hold A One-On-One Performance Review Meeting With Employee: Manager Evaluation: 2014-2015 Performance Cycle: Annual Review -- Staff Non-Manager: Tommy Trojan

☆

7 second(s) ago - Effective 09/30/2016

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.
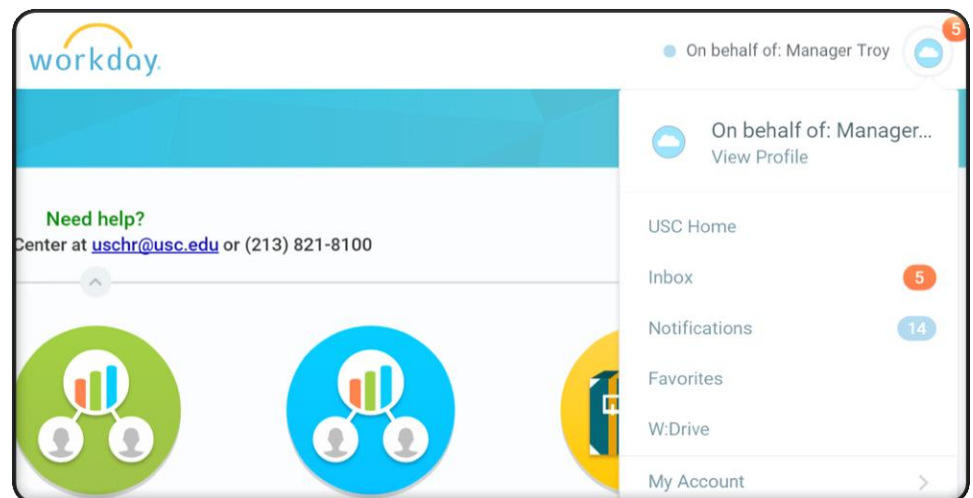
Your Inbox: Choose the **"Manager Evaluation Performance Cycle: Annual Review…"** tab in your inbox.

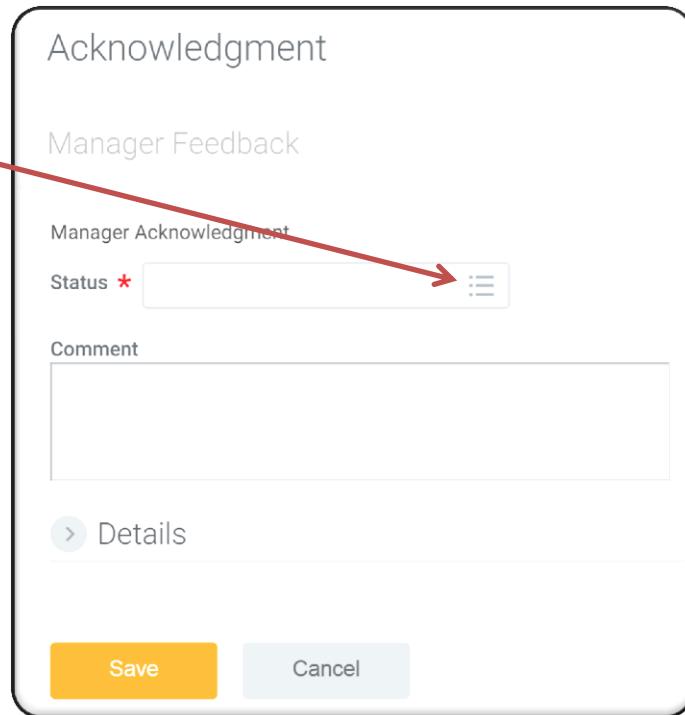Ensure you choose the task associated with the appropriate employee.
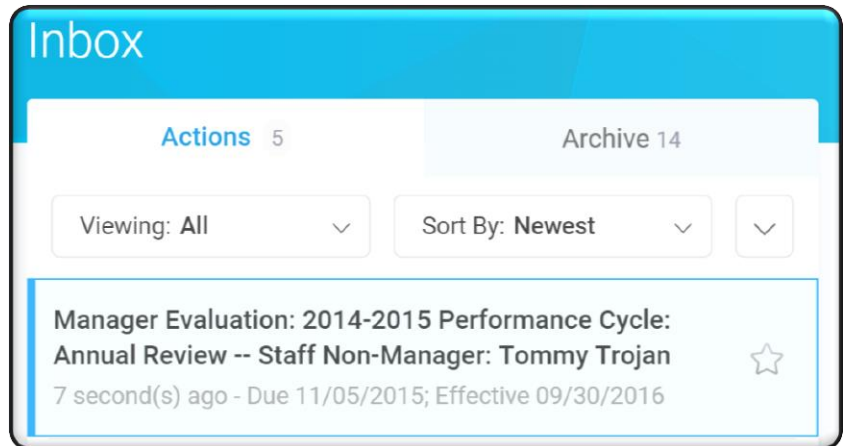
Acknowledgment Step:
On this page, you will see the **"Acknowledgment" manager feedback** step. Select the "edit" icon on the far right corner in order to provide **manager review comments** if necessary, and **electronically sign** as acknowledgement.

Click on the prompt box:

Acknowledgment

Manager Feedback

Manager Acknowledgment
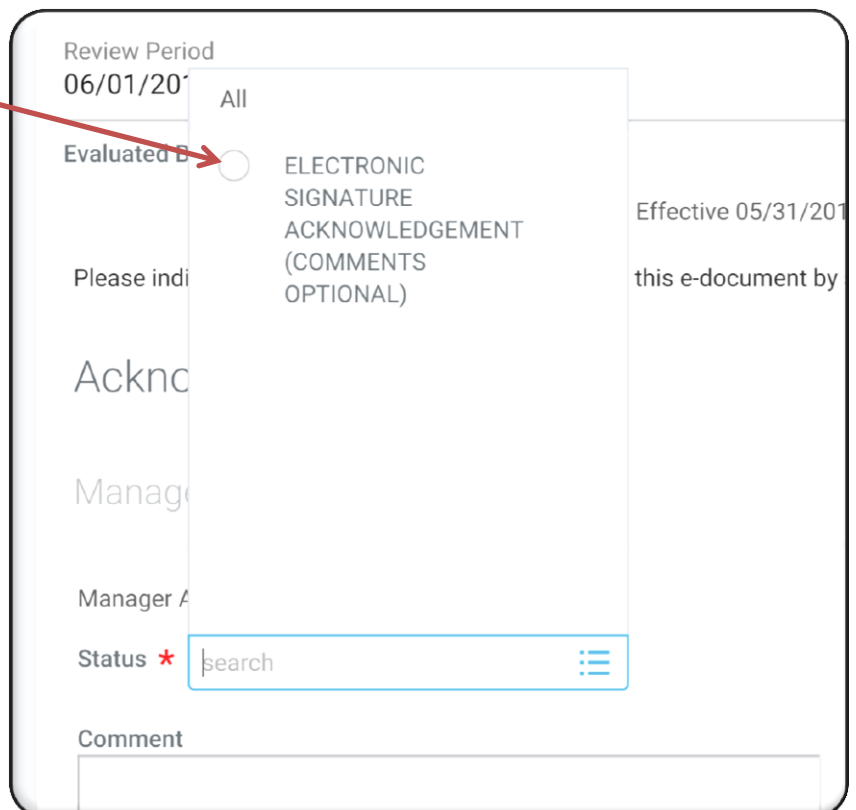
Status ***** [_____]

Comment

[   ]

> Details

Save   Cancel

Electronic Signature: Click inside the circle: **"Electronic Signature Acknowledgement (Comments Optional)."** Then click "**Save**."

Review Period
06/01/201

All

Evaluated B

○ ELECTRONIC
SIGNATURE
ACKNOWLEDGEMENT
(COMMENTS
OPTIONAL)

Effective 05/31/201

Please indi   this e-document by

Ackno

Mana

Manager A

Status ***** [Search   ≡]

Comment

On this same page, you may also review both the manager and employee evaluation. Once you have reviewed, click "**Submit.**"

Performance Criteria

Criteria
A. Quality of Work

Definition
Produces results and/or provides services consistent with defined University standards for the position.

Behavioral Indicators:

* Demonstrates attention to detail and accuracy
* Produces work that is accurate, complete and of high quality
* Provides service that is responsive, courteous and respectful
* Seeks opportunities and takes action to improve skills and quality of work product and/or services
* Maintains a safe workplace for self and others

Manager Evaluation

Manager Level   3 - Meets Expectations or Effective

Behavior   Employee meets the criteria and standards of job performance for all aspects of this competency. Performance is steady, reliable and is maintained with a minimum of supervision. Employee consistently demonstrates the expected standard of performance for this competency, accomplishing his/her goals and objectives as well as meeting all required job standards.

Comment

Employee Evaluation

Employee Level   3 - Meets Expectations or Effective

Employee meets the criteria and standards of job performance for all aspects of this competency. Performance is steady, reliable and is maintained with a minimum of supervision. Employee consistently demonstrates the expected standard of performance for this competency, accomplishing his/her goals and objectives as well as meeting all required job standards.

Comment

[Submit] [Save for Later] [Close]

Congratulations! You're done!