Performance Appraisal  
AMP and SP EMPLOYEES

1. The immediate supervisor receives an Inbox Task to complete evaluation of employee. This applies to AMP and SP in Supervisory positions, and SP employees for the fiscal year (July 1st of the prior year - June 30th of the current year). Please remember that work performed from July 1st of the current year through June 30th of the following year will be reviewed in August of the following year. This does not apply to Faculty or OPS/Temporary employees.

2. Appraisals will route to the supervisor for the majority of the event, so the supervisor who was on record during that period of time. To Reassign and evaluation, click on the settings icon on the Inbox Task, and reassign to the appropriate person.
3. The immediate supervisor assigns a rating in each category. Immediate supervisors MUST rate the employee across all performance/professional competencies.
Performance Appraisal
– Manager Evaluation

AMP and SP EMPLOYEES

4. The immediate supervisor will then rate and comment on the Last Year’s Goals, and comment on Next Year’s Performance Goals. The immediate supervisor may add goals, even if the employee did not add the goals themselves. Existing goals may be utilized.

5. The immediate supervisor selects an Overall Performance Rating and submits it to the higher level supervisor. Too New to Rate (less than 4 months) is to be used only if the employee is new to the University. If the employee’s current job is new, then collaborate with the prior supervisor on the appraisal. When finished, the immediate supervisor clicks Submit which will route to the higher level supervisor for review. The immediate supervisor can click Save for Later if they are not ready to submit.

*If the Overall Rating is Needs Improvement or Below Standards, then the appraisal will automatically route to Employee Relations for review and the next steps.
6. The higher level supervisor receives the Inbox Task to review the appraisal. At the discretion of the Dean, Director, Vice President or his/her designee an additional reviewer can be added.

7. To add an additional reviewer:

   Click the More dropdown button.

   Select Add Approvers.
Type the name of the person you were instructed to add as a reviewer and write a comment stating you are sending the appraisal to them for additional review.

The additional reviewer will click Approve if they agree with the evaluation. If they do not agree, they should Send Back with comments, and then schedule a meeting with the higher level supervisor and/or immediate supervisor to discuss the reasons, and update the appraisal as necessary.
8. After the additional reviewer and/or higher level supervisor approves the appraisal, the immediate supervisor will receive a Workday Inbox To Do to schedule a face to face meeting with employee to discuss the performance appraisal. Once the meeting has been scheduled and conducted, the supervisor will click Submit.

Complete To Do Schedule Performance Appraisal Meeting with Employee Prior to Submitting

- The higher level supervisor has approved this employee's performance appraisal.

Next Steps:
1. Schedule a meeting to discuss the appraisal with the employee
2. Print 2 copies of the appraisal for discussion by clicking on the employees name in this task > Performance Tab > Performance Reviews > Create PDF
3. Meet with the employee and conduct the review
4. Click submit on this task to release the appraisal back to the employee to Acknowledge

The employee must Acknowledge in Workday that they have discussed the review, in order to complete the process. At that time they can add comments if desired.

9. After the face to face meeting with their immediate supervisor, the employee will receive a Task in their Workday Inbox to acknowledge that they met with their immediate supervisor and discussed the appraisal.
10. The employee will acknowledge with or without comment that their immediate supervisor met with them to discuss the performance appraisal.
11. If the employee acknowledges with comment(s), then this screen will appear and the appraisal with comment(s) will be routed to the immediate supervisor.

12. The immediate supervisor will then review the employee’s comment(s) and acknowledge with OR without comment.
13. The immediate supervisor will receive the following message stating the appraisal is complete.

14. The employee will be sent a notification stating if the immediate supervisor acknowledged with comments, where to locate their appraisal, and the employee will then need to press Submit to complete the process.
The appraisal process is now complete.

The Performance appraisal process is completed and the record is stored in Workday under the Performance Worklet on the employee’s home screen.
Performace Appraisal – Manager Evaluation

The Performance appraisal record is also accessible in Workday under the Performance tab and then Performance Reviews tab when viewing the employee’s profile.

Entire Process Flow – Annual Review