PERFORMANCE APPRAISALS – SELF-EVALUATION

1. The employee receives an Inbox Task to complete a self-evaluation. This applies to 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.

The employee can expand the Self-Evaluation to the entire Workday screen by clicking on the double arrows in the top right hand corner. The employee will then utilize the Guided Editor for a simple step-by-step guide OR the Summary Editor to edit everything on one page.
2. The first part of the Performance Appraisal process is for you to self-evaluate based on the job competencies and how you perceived your performance over the appraisal period. Add your comments to the individual competencies by clicking on each section.

3. You can Save for Later if you are not finished, or Submit when you are finished.
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4. Add Last Year’s Goals and comment on how they were met over the past year. Include comments on goals that were not attained, such as those due to a change in direction of University focus.

5. Add Next Year’s Performance Goals. List the agreed upon goals for the upcoming year. Performance goals should support the overall mission of the Department, Division, and University.
6. To Use Existing Goals, click Add then select Use Existing Goal. Use drop down to select Existing Goal (see below).
7. When you have finished, click Submit. It will route to your immediate supervisor. Once the higher level supervisor approves the appraisal, your immediate supervisor will schedule a time to meet with you to discuss the appraisal.
8. After you meet with your immediate supervisor, then you will receive a notice in your Workday Inbox to acknowledge that you and your immediate supervisor met to discuss the contents and overall rating* of the performance review. You have the opportunity to add comments if you choose. The overall process is not complete until you acknowledge and submit.

*The overall rating will NOT appear until the process is complete.
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9. If you acknowledge with comment, then the following screen will appear and your comment(s) will be routed to your immediate supervisor.

10. Your immediate supervisor may acknowledge with or without comment. If they acknowledge with comment, then you will receive a To Do in your inbox. You MUST click Submit to finalize the appraisal.
11. The appraisal can be accessed via the Performance Worklet on the home screen and/or Performance tab in your profile.