1. The immediate supervisor receives an Inbox Task to complete an evaluation of the employee. 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. This does not apply to Faculty or OPS/ Temporary employees.

2. Appraisals will route to the supervisor for the majority of the event, which is the supervisor who was on record during that period of time. To Reassign the evaluation, click on the settings icon in the upper right hand corner on the Inbox Task, and reassign* to the appropriate person.

*Reassignment will not be automatic; it must be approved by HR and/or OIT
3. The immediate supervisor assigns a rating in each category. Immediate supervisors MUST rate the employee across all performance/professional competencies.
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 previous supervisor to complete the appraisal evaluation. 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 assistance with 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, then they will Send Back with comments, and 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; DO NOT click Submit BEFORE meeting with the employee.

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

Please note – Once you click submit on this task, the appraisal will be sent to the employee. Leave this task in your Inbox, or click “Save for Later” until you have had a chance to meet with the employee.

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.

I have reviewed and approved the performance appraisal contents and overall rating with the consultation of the higher level supervisor and additional reviewers, if applicable.

Acknowledgment

Manager Feedback

Manager Acknowledgment

Status

- Acknowledge without Comment
- Acknowledge with Comment

Employee Acknowledgment

Status

- Acknowledge with Comment

Comment

This is where the employee's comments will appear.

Immediate Supervisor will Comment here
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 comment(s), where to locate their appraisal, and the employee will then need to press Submit to complete the process.
The appraisal process is now complete.

Once the Performance Appraisal process is complete, then the record is stored in Workday under the Performance Worklet on the employee’s home screen.
The Performance appraisal record is also accessible in Workday under the Performance tab and then Performance Reviews tab when viewing the employee’s profile.