2023-2024 Annual Performance Review Guide for Supervisors

Navigate to your Workday inbox.

Locate the "Performance Review-Manager Evaluation" task for your employee.
Click ⌐˥ to maximize the screen.

☆ ⚙ ⌐˥   Created: 08/15/2024 | Effective: 08/31/2024

Complete Manager Evaluation

Manager Evaluation: Annual: Staff Performance Review 2023: Alejandra Sauceda   ⋯

⊞   PDF

Review Period   09/01/2023 - 08/31/2024

INSTRUCTIONS FOR MANAGER: The annual Performance Review process has been initiated for the referenced Employee. Upon completion of the evaluation, please ensure you meet with the Employee to discuss the performance review: provide feedback on strengths and areas for development in relation to our core competencies, the position's responsibilities and the Employee's goals.

In the final step of the review process you will have an opportunity to indicate that an update to the Employee's position restrictions is needed. Selecting Option 2 during this step will route a To Do step to Edit Position Restrictions to your member's designated security role: Primary Manager, HR Contact or HR Partner.
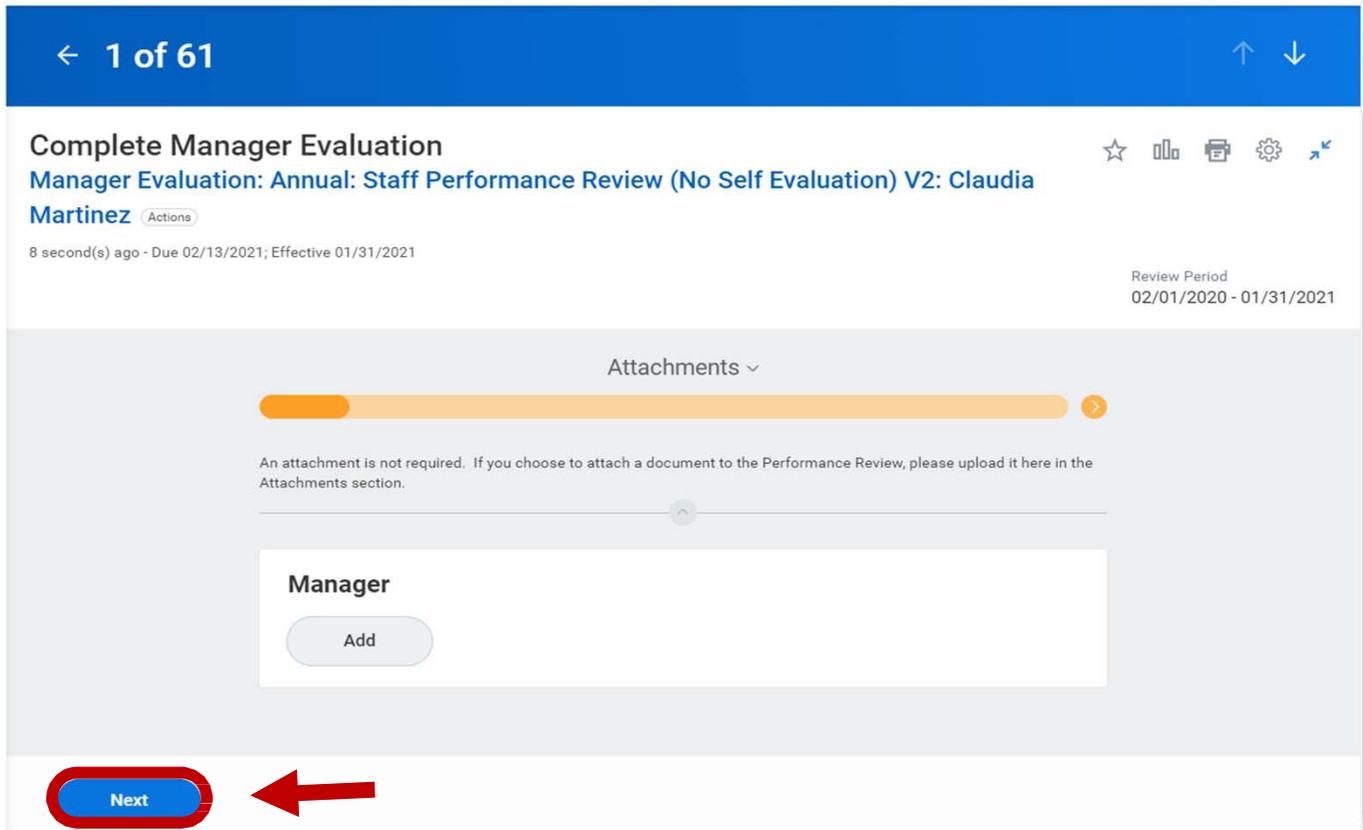
Get Started

Click on "Get Started" button to begin.

> Note: If you are not the employee's direct supervisor, contact Human Resources Director, Jan Aspelund.

The first section of the performance review will be the Attachments section. Do not upload an attachment.

You can proceed to the next screen by clicking the "Next" button.

Next, you will be required to rate your employee's goals. If there are no goals populated for your employee, please enter them at this time by selecting the "Add" button.
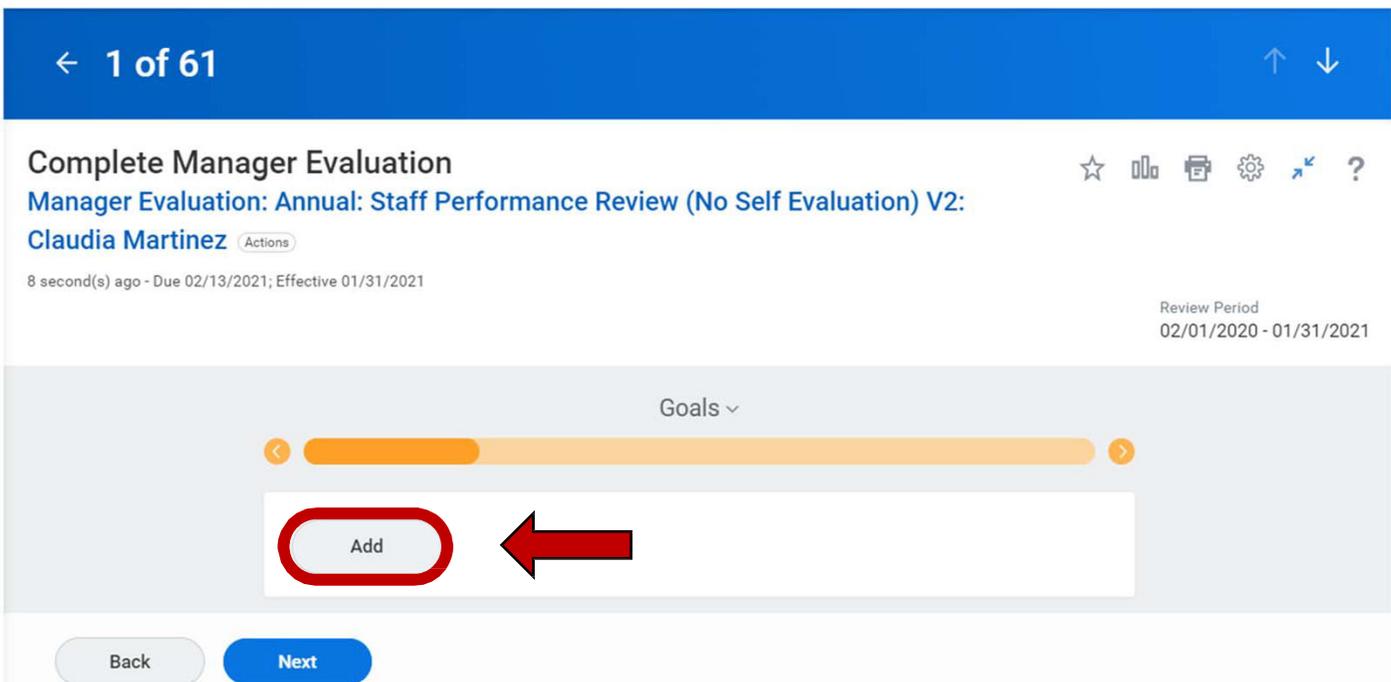
Goals

Goals

This section provides the opportunity to rate and comment on goals the Employee established during this performance review period.

If you used the *Get Additional Manager* feature for this evaluation, their comments for this review section can be viewed below each goal listed.

The Performance Review requires that you provide an updated status, a rating and accompanying comment for all of your employee's goals.

Add Existing — Search ⟵ — Use this field to add in any existing employee goals not already part of this review. Select a goal from the prompt and it will be automatically added to the review section content below.

Goal * — Format | B I U A ∨ | ☰ | ⬀
Enter title of goal. ⟵

Description — Format | B I U A ∨ | ☰ | ⬀
Enter goal description. ⟵

Due Date — MM/DD/YYYY ⟵ — Enter due date (if one exists).

Organization Alignment — [   ]

Status — select one ▼ ⟵ — Update your employee's progress in achieving the goal.

Manager

Rating — select one ▼ ⟵—Provide a rating for all employee goals.

Comment — Format | B I U A ∨ | ☰ | ⬀
Enter comment here. ⟵

(Remove)

(Add) ⟵ — **Click to add any additional goals. Otherwise click "Next" to proceed to the next section.**

(Back) (**Next**) (Save for Later) (•••)

Competencies

Employees must be rated on the following general competencies: service, teamwork/collaboration, support of A&M System core values, initiative and accountability.

Competencies

This section provides an opportunity to rate and comment on competencies expected of the Employee. Competencies are a system wide component of performance reviews for all of The Texas A&M University System.

If you used the *Get Additional Manager* or the *Get Additional Reviewer* feature for this evaluation, their comments for this review section can be viewed below each goal listed.

5 items

Competency	Description	Manager Evaluation
Service	Promotes a culture of service. Examples of behaviors might include: • Responds appropriately to the needs of internal and external customers. • Seeks to secure positive interpersonal relations. • Conveys instructions, ideas, and information clearly. • Follows through on commitments to others. • Represents one's position, work unit and organization both internally and externally professionally and responsibly. • Anticipates needs or problems and acts to meet or resolve responsibly, efficiently and cost-effectively. For research focused positions, examples of behaviors include: • Works to create and sustain	Rating [ ] Comment *Enter comment here.* ←

Update rating for each area.

Remember to scroll down to view all 5 areas that must be rated.

Once all general competencies have been rated, click on the next button to proceed to the next section, Supervisory Competencies.

Back   Next   Save for Later   •••

Supervisory Competencies

All employees must be rated on supervision and organizational leadership. If these are not relevant to the employee, please include a comment stating the same.

Supervisory Competencies

This section provides the opportunity to rate and comment on competencies specifically focused on the Employee's ability to carry out their supervisory responsibilities. If the Employee is not a supervisor, you can leave this section blank.

If you used the *Get Additional Manager* or the *Get Additional Reviewer* feature for this evaluation, their comments for this review section can be viewed below each goal listed.

2 items

Update rating for each area.

Remember to scroll down to view both competencies.

Competency	Description	Manager Evaluation
Supervision	Manages performance and cultivates a positive work environment. Examples of behaviors might include: • Promotes employee excellence by establishing appropriate performance goals and assignments; providing coaching, feedback, and support; and rewarding high performance. • Provides clear direction and communicates expectations. • Manages employee performance issues. • Promotes employee well-being. • Supports employee growth by assisting with career plans and providing opportunities for professional development. • Promotes collaboration and teamwork within work unit.	Rating Comment *Enter comment here.*
Organizational Leadership	Cultivates a high-performing and fiscally responsible workplace. Examples of behaviors might include: • Communicates, supports and promotes the organization's	Rating Comment

Once all competencies have been rated, click on the next button to proceed to the next section.

Back   Next   Save for Later   ...

Review of Responsibilities

The Review of Responsibilities section will <u>not</u> be used by TAMIU.

You can proceed to the next screen by clicking the "Next" button.

Review of Responsibilities

This section provides the opportunity to rate and comment on Employee responsibilities. These responsibilities are typically located within the Position Restrictions on the Employee's position in Workday.

How do I view the responsibilities for this position? You can access these responsibilities by selecting the **Related Information** icon located in the blue left-hand navigation bar.

Alternatively, you can exit this review and follow the directions below to access the Responsibilities of the position:

1. Navigate to the Employee's Worker profile.
2. Locate the link for the Employee's position on the right side of the page under Job Details (Position) and select the **Related Actions** icon.
3. Select the **Position** > **View Position Restrictions** from the Actions menu. The Responsibilities are listed on the **Qualifications** tab.

BE ADVISED: If no information is displayed after using one of these options, the Employee's position has no defined responsibilities. You may need to work with your local Human Resources office to resolve this issue.

If you used the *Get Additional Manager* feature for this evaluation, their comments for this review section can be viewed below each goal listed.

Back   Next   Save for Later   •••

Training Certification

If your employee is past due on any required trainings, please update the rating to "Yes" and enter the details in the comments area.

Otherwise, update the rating to "No".

Certification Question

Question:
Employee must not be past due on any assigned required employee training courses. If employee is past-due on one or more assigned required employee training courses, manager and employee will discuss an action plan for the employee to complete the assigned courses in timely manner.
Is Employee past due on any assigned required employee training courses?

Manager Evaluation

Rating/Answer

select one ▼

Response/Comment

Format ∨ | **B** *I* U A ∨ | ≡ | 🔗

Enter comment here. ←

Back   Next

Click the next button to proceed to the next section.

Overall Rating

Provide an overall rating for your employee.

*The overall rating should reflect the **average** of all other ratings and must include a comment explaining the reason for the rating.*

Overall Rating

Manager Evaluation

Rating *

select one ▼

Comment

Format ∨ | **B** *I* U A ∨ | ⁝☰ | ⬚

Enter comment here. ←

Back   Next ←

Manager/Employee Review Meeting

Supervisors must set aside time to meet with each employee and discuss the ratings and comments concerning the employee's performance <u>prior</u> to completing the evaluation.

Once the performance evaluation is submitted, it cannot be changed

Manager/Employee Review Meeting

It is recommended you do not submit the review until you have met with your Employee. Pausing here allows you to return after the meeting and update or edit the review with additional content discussed during this meeting.

At this point you are able to print this performance review, if needed, for your meeting with your Employee. A printed copy will contain all Employee and Manager ratings and comments added to the review.

The **Save for Later** button at the bottom of the page will save the review and its contents to be submitted later and will be waiting in your Workday inbox.

If you are ready to submit this review for the Employee and the Manager Acknowledgements, answer the question below and select the **Next** button.

Question: Have you had your Performance Review meeting with your employee?

Manager Summary

Rating/Answer * | select one ▼

If you have not yet met with your employee, answer "No" to this prompt and select "Save for Later".

The performance review will remain in your Workday inbox.

Back   Next   Save for Later   ...

Once you have met with your employee, return to this section and update the answer to "Yes". Click on the "Next" button to proceed.

Performance Review Summary

Please review the evaluation and edit ,if necessary, by selecting the appropriate area from the ribbon on the left.

Meet with your employee to discuss the performance review <u>before</u> clicking the submit button. *Once you have submitted this item you will no longer be able to edit it.*

View Printable Employee Review

|←   *Click to expand/collapse.*

Competencies

Manager Evaluation: Annual: Staff Performance Review 2023: TAMIU Employee

(Actions)

09/01/2023 - 08/31/2024

🖨 ← *Click to generate PDF document to share with your employee*

5 items

Competency	Description	Manager Eva
	and external customers. • Seeks to secure positive interpersonal relations. • Conveys instructions, ideas, and information clearly. • Follows through on commitments to others. • Represents one's position, work unit and organization both internally and externally professionally and responsibly. • Anticipates needs or problems and acts to meet or resolve responsibly, efficiently and cost-effectively. For research focused positions, examples of behaviors include: • Works to create and sustain a measurable, high standard of quality in research. • Facilitates relationship	

- ● Attachments
- ● Goals
- ● Competencies
- ● Supervisory Competencies
- ● Review of Responsibilities
- ● Certification Question
- ● Overall Rating
- ● Manager/Employee Review Meeting
- ○ Summary

Remember to update the "Manager/Employee Review Meeting" section to "Yes" once you have met with your employee.

(**OK**) (Back) (Close)

Click "Submit" after you have met with your employee. Remember, you will no longer be able to make any edits after clicking "Submit," and the evaluation will be sent to the employee's Workday inbox.

Manager Acknowledgment (following employee's acknowledgment)

Click on "Get Started" to review all areas of the evaluation (now including the employee's acknowledgment and comments).

Click "Next" to go the manager acknowledgment page. Update the status and comments fields.

Option1: I have reviewed the position restrictions for accuracy and updates ARE NOT REQUIRED. I acknowledge I have reviewed and discussed this performance evaluation the Employee.

Option 2: I have reviewed the position restrictions for accuracy and updates ARE REQUIRED. I acknowledge I have reviewed and discussed this performance evaluation with the Employee.

Acknowledgement

Manager Acknowledgement

Status *

Search

Comment

Format

B I U A :≡

Employee Acknowledgement

Status

Option 1: I acknowledge I have reviewed the position restrictions for accuracy; I have reviewed and discussed this performance evaluation with my Manager and I AGREE with the evaluation.

Comment
Friday, 2/5 @ 5PM. These are my comments.

Entered by
Claudia Martinez

Enter the date and time you met with your employee and any relevant comments.

Submit   Save for Later   Close

Click "Submit" to complete the Performance Review.

Once you have submitted the Performance Review, it will now reflect a status of 100% for HR reporting purposes.