DIRECTIONS FOR:
COMPLETE PERFORMANCE REVIEW (Staff with Self Evaluation)

Your performance review template has been launched in your Workday Inbox.

Please follow the steps below to complete your Self Evaluation.

1. Click the “Self-Evaluation (Employee) action item in your inbox.

2. You can complete the self-evaluation in one of two ways:
   - Guided Editor: Use a simple step-by-step guide (complete all comments – Save for Later at end of evaluation)
   - Summary Editor: Edit all sections using a one-page view (can use Save for Later at any time to complete process)

Note: This job aid will take you through the perspective of using the Guided Editor

3. You have the option to add attachments relevant to the performance review. Attachments can be added at the beginning of the form as shown below. Attachments should be within the evaluation cycle (April 1, 2018 – March 31, 2019)
1. Click Go to Guided Editor

**IMPORTANT:** The Performance Review may not contain prepopulated goals for all employees, so you may see a blank screen with an Add button

2. The following message also displays:

![Help Available](image)

**Note:** If you select Show Me, fields will appear to review / enter goal information with question mark icons. Click the icon for further information about the field

![Goal Description and Due Date](image)

Below is an example of what the help text looks like when you click on the icon

![Sample Help Text](image)

3. If you prefer not to have Help Text available, click the "X" and close out of the message
Rate Yourself on Goals

4. Begin your Self Evaluation by clicking **Add** if your Goals are not prepopulated

You will then see the following without the added Help Text icons:

*Note that the fields are the same

5. Review prepopulated goals or enter goals and relevant information including:

   **Goal.** Recommendation: Goals should be written in measurable form to help determine the extent to which they have been met (e.g. Employee will complete three professional development opportunities)

   **Description.** This field can include more detailed information on what the employee will do to meet the goal as well as what resources may be needed to meet the goal

   **Due Date.** This is the date by which the employee is expected to have met the goal

   **Status.** This is your current status on meeting this goal. Options include: Discontinued, Not Started, In Progress and Complete

   **Rating.** This is your evaluation of yourself on this goal. Options include: Does not meet Expectations, Partially Meets Expectations, Meets Expectations, Exceeds Expectations, and Significantly Exceeds Expectations

   **Comments.** Enter comments for your manager to support your rating. This can help your manager have information of which they may not be aware.

   **Note:** Prepopulated information should not be edited without prior discussion with your manager

6. Click **Next** after completing the information described above for all goals
Rate Yourself on Competencies

7. On the Competencies page, click the Edit icon and enter Rating and Comments for each competency (e.g., Service, Teamwork / Collaboration, Diversity & Respect, Initiative and Accountability)

8. Click Next

Rate Yourself on Supervisory Competencies (if applicable)

9. Enter ratings for Supervisory Competencies (e.g., Supervision and Organizational Leadership), if needed

Rate Yourself on Responsibilities

10. Enter ratings for Responsibilities

Note: Responsibilities should be prepopulated from the position restrictions. If not, please contact your Manager for assistance

11. Click Next
**Answer the Certification Question**

12. On the **Certification Question** page, answer the question, "Is Employee past due on any assigned required Employee training courses"? Select "Yes" or "No" in the **Rating** field.

**Employee Evaluation**

- Rating: select one
- Response:

13. Click **Next** to see the summary of all the details entered.

14. Review the information and click **Submit**.

15. Click **Done**.

The Manager will complete the evaluation of the Employee.

If you do not have an Annual Performance Review in your Workday Inbox please email Patti Morgan at **Patricia.Morgan@tamus.edu**.