

Overview

Use this job aid as a resource to complete an employee's Six-Month Performance Evaluation (Probation Review). A probationary period is that period of time that an employee is required to serve in a position to demonstrate his or her knowledge, skills and ability to perform the duties of said position satisfactorily. Probationary periods are required for all new hires, and for regular staff who are promoted or transferred into a different job class, and for temporary employees who are promoted or transferred into a regular position. (P&P 33004CP) During this period, an employee is given feedback about job performance, job and performance expectations, review of collegewide competencies, discussion of goals, and professional development.

The Talent Administrator will initiate an employee Six-Month Performance Evaluation (Probation Review) to start their review. An employee will receive a Workday Inbox task to complete. Once an employee have completed their part of the Performance Review form and submitted, it routes to the employee's supervisor/manager for completion.

Performance Review Evaluation

1. From the **Home** Screen, click the **Inbox** icon in the upper right hand corner.



2. Select the **Set Content: Probation Review: Your Name**



Set Content: Probation Review:

3. Read the **Introduction** at the top of the page.

4. Select one of the following options:

- **Go to Guided Editor:** This is the preferred method to ensure each section is completed. Select this option to see each section of the evaluation one at a time. If you select this option, you will need to scroll down to navigate through each section.
- **Go to Summary Editor:** Us this section to review or edit what you entered using the Guided Editor. Select this option to see each section of the evaluation all on one page at the same time. If you select this option, you will need to scroll down to navigate through each section.

5. Complete each section of the evaluation. Each section of the evaluation corresponds to the section titles below. Please review the instructions for each section as needed.

Complete Employee Probation Review

Workday Job Aid for Employees Eligible for a Probation Review

Primary Work Responsibilities

The Probation Review does not include an employee self-evaluation. You do not complete this section of the review. No action required by you in this section.

Goals

In this section, you reflect on the outcome of your goals during your probation review period.

1. Enter Goal(s) if not already entered. OR Place a check mark (√) under Use Existing Goal. This allows you to pull in a goal cascaded from your supervisor/manager, or a goal you entered.
2. Review each Goal and enter a **Comment** that describes your progress towards the Goal.
3. The following are optional to complete:
 - a. Description – enter a description/background information about a goal
 - b. Category – you can select more than one category that best fits the goal
 - c. Supports – select how the goal aligns with the one of the College’s strategic plan goal
 - d. Due Date – enter a completion date of the goal
 - e. Status – select from the four options of the goal status
4. Click Add to enter another goal and follow steps 2-3.
5. Each goal you enter and complete in this section may route to your supervisor/manager for review and approval.

Competencies

In this section, you can view the seven Collegewide competencies. You do not complete this section of the review. This section provides a preview of how your supervisor will evaluate you on each

competency. No action required by you in this section.

Professional Development Goals

In this section, enter your Professional Development Goals.

1. Enter a Professional Development Goal(s) if not already entered. OR Place a check mark (√) under Use Existing Professional Development Goal. This allows you to pull in a previously created Professional Development Goal.
2. Review each Professional Development Goal.
3. The following are optional to complete:
 - a. Additional Information – enter information/description/background information about a professional development goal
 - b. Category – you can select more than one category that best fits the professional development goal
 - c. Start Date – enter the start date of the professional development goal
 - d. Due Date – enter a completion date of the professional development goal
 - e. Status note – enter information about the status of the professional development goal
4. Status – you must select the a status of the professional development goal from the four options
5. Click Add to enter another professional development goal and follow steps 2-3.

Set Review Content

This is an opportunity to review what you entered into the Probation Review form before you hit Submit and send it to your supervisor/manager. Please follow their instructions about when this is due to them.

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1. Use the pencil in the Goals and Professional Development Goals section to make edits.



2. At this stage of the probation review, you can:
 - a. Submit – this will send to the supervisor/manager for their completion
 - b. Save for Later – this allows for the probation review to remain in your **Inbox** as a task until you are ready to Submit
 - c. Close – a window appears stating: Changes Save. You're leaving this task. Your changes are saved.
 - i. Click Cancel or OK.
 - ii. OK will end this task. Task remains in your Inbox.
3. Hit Submit when you are ready to send the Probation Review to your supervisor/manager for their completion.
 - a. A separate window appears with the following message:
Success! Event submitted.
Up Next: Name of your Supervisor, Set Review Content View Details
 - b. View Details provides you a view of the Probation Review

Manager/Supervisor received Inbox Item to review submitted Probation Review from Employee. In the Set Content review process, they can **SEND BACK** the Probation Review to employee with a reason for the send back.

- 1) Return to the **Home** Screen, click the **Inbox** icon in the upper right hand corner.



- 2) Select the **Set Content: Probation Review: Your Name**



Set Content: Probation Review:

- 3) Scroll towards bottom of Set Content Review page to **View Comments**.

[View Comments \(1\)](#)

This is where you will find the Send Back reason given by the Manager/Supervisor.

Send Back Reason: 8/16/2021: 1

- 4) Scroll back up the page and select either the Guided Editor or Go To Summary Editor to navigate through the Set Review Content and view the edit/change made by your manager/supervisor.
- 5) Move through each section to reach the section where the edit/change was made.
- 6) Review the edit/change. You can also make edits by using the pencil in the section. Make your edit(s).



- 7) Click the check mark to Save.



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- 8) Navigate to the end - Set Review Content, and click Submit to return the Probation Review to your manager/supervisor.
- 9) A Success! Event Submitted pop-up window appears.

Success! Event submitted

Up Next: Employee Name, Set Review Content

- 10) Probation Review is routed back to the manager/supervisor.

Once the manager/supervisor completes the Manager Evaluation for Employee Probation Review, manager/supervisor sets-up a meeting with you to discuss the Probation Review. The manager/supervisor are able to share with you the Probation Review either online during the meeting or provide a hard copy in PDF format before the meeting for discussion during the meeting.

Once the meeting has taken place, you will receive an Inbox task:

Manager Evaluation: Probation Review:

Click on this task item and read the statement found in this task.

I have reviewed the performance evaluation on the date indicated below. I had the opportunity to discuss with my supervisor and have received a copy of the evaluation. My signature does not necessarily indicate agreement or disagreement with the content of this evaluation.

Before you affix your acknowledgement, scroll down the page to review the Probation Review.

As stated above, acknowledgement does not necessarily indicate agreement or disagreement with the content of this evaluation. You can Acknowledge the Probation Review with or without comments.

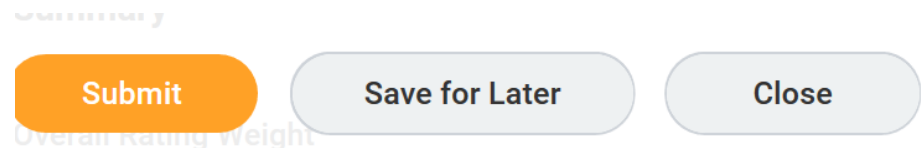


Click on the pencil to select Status and use the Comment box to enter comments if you selected 'Acknowledge Review with



Comments.' Click the check to save.

You have the options to:



Save for Later – task remains in your Inbox until you are ready to submit.

Close – changes are saved and you are leaving this task. Task remains in your inbox until you are ready to submit.

Submit – this will route the probation review to the manager/supervisor for their acknowledgement. Pop-up box states "Success! Event submitted. Up Next: Manager/supervisor name, Provide Manager Review Comments."

Once the Probation Review is completed – Acknowledged by employee and manager/supervisor, you will receive a Notification of completion.

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Upper right hand corner of your dashboard by your picture or cloud is a bell. The bell denotes Notifications. Click on the bell.

Review Period		Manager Rating	View	Create New PDF
Start Date	End Date			
04/16/2020	10/15/2021	Fully Meets Performance	View	Create New PDF

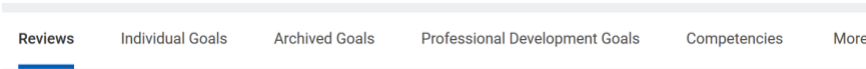


Manager Evaluation: Probation Review:

Your Six-Month Performance Evaluation is now complete with acknowledgement by you and your manager.

To view and/or download a PDF copy of your Probation Review:

1. Click on your picture or cloud at the top right hand corner.
2. Select View Profile.
3. From the left navigation pane (in blue), click on Performance.
 - a. If not visible, click on More (#)
4. Probation Review can be found under Reviews.



First column is not visible below, but will have the review type and employee name.