

## Overview

Use this job aid as a resource to complete the Manager/Supervisor steps of the staff Probation Review (Six-Month Performance Evaluation). When an employee completes their step of the Probation Review process, you will receive Workday Inbox tasks to complete. The first task is to Set the Content Review for your new employee. After completing this task, the next task will be to Get Additional Manager Evaluation. For the Probation Review, this task can be skipped. Once this task is submitted, you receive a second task to Complete Manager Evaluation.

**Note:** If you choose to use the Get Additional Manager feature, **do not begin** your part of the probation review until you have received notification that the additional reviewer(s) under the Additional Manager Evaluation have completed the evaluation. **Their evaluation comments will not be visible to you if you start the evaluation before theirs is completed.**

## 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**: Employee Name



Set Content: Probation Review:  
16 second(s) ago - Effective 10/

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:** Use 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.

## Primary Work Responsibilities


You do not complete this section at this time.

## Goals

In this section, you are able to review the goal(s) entered by the employee.

1. Use the pencil in the Goal section to make edits.



2. Edits, if needed, can be made to:
  - a. Category – you can select more than one category that best fits the goal
  - b. Supports – select how the goal aligns with the one of the College’s strategic plan goal
  - c. Due Date – enter a completion date of the goal
  - d. Status – select from the four options of the goal status
  - e.  Use this to save the edits.
3. Use the Add button to add goal(s) to the probation review, if needed, and follow the instructions below:
  - a. Enter Goal(s). OR Place a check mark (✓) under Use Existing Goal. This allows you to pull in a goal.
  - b. The following are optional to complete:
    - i. Description – enter a description/background information about a goal
    - ii. Category – you can select more than one category that best fits the goal
    - iii. Supports – select how the goal aligns with the one of the College’s strategic plan goal
    - iv. Due Date – enter a completion date of the goal
    - v. Status – select from the four options of the goal status
  - c. Click Add to enter another goal and follow steps a-b.

## Competencies


In this section, you can view the seven Collegewide competencies. You do not complete this section of the review at this time. This section provides a preview of how you will evaluate an employee on each competency.

## Professional Development Goals

In this section, you are able to review the Professional Development Goals entered by the employee.

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



2. Edits, if needed, can be made to:
  - a. Category – you can select more than one category that best fits the goal
  - b. Start Date – enter a start date of the goal
  - c. Due Date – enter a completion date of the goal
  - d. Status – select from the four options of the goal status
  - e. Status Note – enter notes about the status of the goal
  - f.  Use this to save the edits.
3. Use the Add button to add goal(s) to the probation review and repeat steps 2.

## Set Review Content

This is an opportunity to review what you entered into the Probation Review form. You have the following options:

1. Submit – a window appears with the following message:

## Complete Manager Evaluation for Employee Probation Review

### Workday Job Aid for Manager/Supervisor

Success! Event Submitted. Up Next: Overall process still in progress.

2. Send Back – allows you to send the Set Review Content back to the employee and you must enter a reason for the send back. This is used if you made edits to the Set Review Content. If no edits were made, there is no need to use this option.
3. Close – a window appears with the following message: Changes Saved. You're leaving this task. Your changes are saved. This task remains in your Inbox.

If you Send Back (#2) a review, a Send Back pop up window appears to complete with the reason you are sending back to the employee. The 'To' auto-populates the Employee Name.

#### Send Back

To \*

Reason \*

Click Submit.

An Event sent Back box pops-up with the following statement:

**Up Next:** Employee Name, Set Review Content for Performance Review

- 4) Set Review Content for Performance Review is routed to the employee.
- 5) Return to your Inbox task item – Set Content: Probation Review:

Employee Name and Select this Inbox item.

- 6) Select either Guided Editor or Go to Summary Editor to navigate through the Set Review Content.
- 7) Navigate through each section to view any edit(s)/change(s) made by employee.
- 8) When you are ready to submit, click the Submit button at the bottom of the last page – Set Review Content.

Please enter comm

- 9) A Success! Event Submitted window pops-up.

## Success! Event submitted

**Up Next:** Manager/Supervisor Name, Complete Manager Evaluation

You are now ready to complete the employee's Probation Review.

Click the Open button in the pop-up window. Or click on the Refresh button.

OR

You have new inbox items.

Either option will take you to the Manager Evaluation: Probation Review: Employee Name task.

#### Complete Manager Evaluation



[Manager Evaluation: Probation Review:](#)



## Complete Manager Evaluation for Employee Probation Review

### Workday Job Aid for Manager/Supervisor


10) Click on the Go To Guided Editor to begin entering your comments and rating for each Section.

a. **Primary Work Responsibilities** – Click on the Pencil  to enter your comments about the employee's primary work responsibilities. Use the check  to save your comments.

1. Scroll down to Manager Evaluation to select the Rating from the drop down menu. The red asterisk (\*) denotes a required action.
  - a. Unsatisfactory Performance
  - b. Needs Improvement Performance
  - c. Fully Meets Performance
  - d. Exceeds Performance
  - e. Exceptional Performance

2. Click the check  to save the rating.



**Note:** This section has an Overall Rating Weight of 25%.

b. **Goals** – Click on the pencil  to select the Rating and Enter comments about goals.

Rating \*

Comment \*

**Note:** This section has an Overall Rating Weight of 25%.

c. **Competencies** – Enter a rating and comment for each competency. Use the pencil  to enter rating and comment and the check  to save your rating and comment.

**Note:** This section has an Overall Rating Weight of 50%.

d. **Professional Development Goals** – This section is not rated. In the Summary Section, you can enter comments about Professional Development Goals.

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### Summary

#### Manager Evaluation

Comment

- e. **Feedback** – A blue number next to All Feedback denotes Feedback is available to view. Click on the number and a pop-up window opens with the feedback. If feedback is not available it will state “**No feedback is available.**”
- f. **Supporting Documents** – You are able to view documents uploaded by the employee. Click on the attached document. It opens as a separate document. Document provides the number of pages and allows you to navigate to the pages.

1 of 2

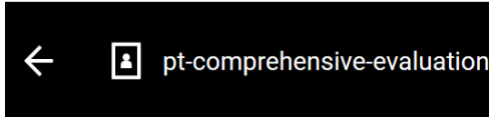


To return to the review, click on the left arrow at the upper left

# Complete Manager Evaluation for Employee Probation Review

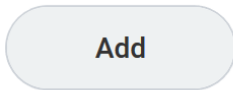
## Workday Job Aid for Manager/Supervisor

hand of the open document. It also contains the name of the document.



In this section, you can also Add supporting documents. Click on Add

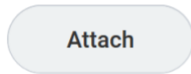
### Manager



Click on Attach


Evaluation Supporting Document  
(empty)

File



Go to File directory where the document is filed/saved. Once found, click Open. File is now attached.

File

 TEST DOCUMENT.docx

After uploading supporting documents, move to the next section by clicking on Next.

- g. Overall – Read the instructions. Please follow instructions if:
  - 1. you want to extend probationary period or terminate
  - 2. you manually change the Overall Rating
    - a. Place check in the box below “I want to change the Rating.”
    - b. A reason must be provided in the Comment box.

The Overall Rating is calculated based on the three (3) weighted sections of Primary Work Responsibilities (25%), Goals (25%), and Competencies (50%).

Comment is required whether you manually change the Overall Rating or not. This is an opportunity to provide additional statements/comments not stated elsewhere in the performance review.

- h. The end of the Complete Manager Evaluation is reached. This is an opportunity to review ratings and comments entered. You can make edits before you hit Submit. OR You can Save For Later if you are not ready to hit Submit.



**Save For Later** – Performance Review will remain in your Inbox as a task and allows you to return to act on it.

**Close** – You will get a confirmation window stating you are leaving this take and the changes made are saved.

## Complete Manager Evaluation for Employee Probation Review

*Workday Job Aid for Manager/Supervisor*

### Changes Saved

You're leaving this task. Your changes are saved.



**Submit** – You are ready to submit and move forward to the next step. A pop-up window appears stating “Success! Event Submitted.”

**Up Next:** Manager/Supervisor Name, Meet with your employee. A To Do task.



Please read the instructions for this stage of the performance review process:

**Instructions** If you recommend extending probation or terminating, and you have not spoken with Employee and tact them before meeting with the employee.  
Please meet with the employee to discuss the evaluation. Submission of this task will release the e Workday and prompt them to acknowledge the evaluation.

**DO NOT HIT THE SUBMIT BUTTON!** Hitting the Submit button will release the performance review to the employee.

1. Set-up a meeting with the employee to review the performance review.
2. Click on the View Printable Employee Review button to

create a copy of the performance review.



Enter Employee Name in text box.

### View Printable Employee Review

Employee Review \*

Click OK. You have an online copy of the probation review to use when meeting with employee. OR

To print or save as a PDF, the upper right hand corner (underneath your picture/cloud) has a PDF Icon.



Two sections are not visible in the printable view – Feedback and Supporting Documents. These can be viewable online separately or downloaded and saved separately.

3. Once you have met with the employee, you can now hit the Submit button. **Note:** If after meeting with the employee and additional changes are needed, DO NOT HIT SUBMIT, contact the **Talent Administrator**. At this stage

## Complete Manager Evaluation for Employee Probation Review

### Workday Job Aid for Manager/Supervisor

of the Probation Review process, a manager/supervisor nor employee can make any additional changes to the probation review. There should not be changes at this point. Probation Review is ready for Acknowledgement by the employee and manager/supervisor.

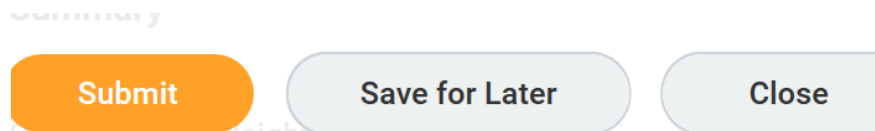
4. After hitting Submit, a pop-up window states “You have marked as Complete. Up Next: Employee Name, Provide Employee Review Comments.

### You have marked as Complete

Probation Review is routed to employee.

Employee acknowledges Probation Review and submits to manager/supervisor.

1. Return to Inbox for task – Manager Evaluation: Probation Review: Employee Name
2. Employee Acknowledgement is visible (right side of page)
  - a. Employee selects Acknowledgement With or Without Comments.
3. Scroll down the entire page to view Probation View.
4. Manager Acknowledgement is the left side of the page.
5. Select Status – Acknowledgement With or Without Comments
6. Use Comment box based on selected Status.
7. Your options are:



**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** – A pop-up box appears stating “Success! Event submitted”.

Probation Review process is complete! The completed Probation Review will appear in the employee’s Performance review tab.

First column is the review type and employee name. This column is now visible below.

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