Workday Performance Management: Completing an Employee Self-Assessment

The Mines Performance Management process takes place in the Workday system. Once the process is initiated by Human Resources (HR) you will receive a notification in Workday. The first step of the process is the employee self-assessment. Refer to the Self-Assessment Guide for Employees located here to prepare for this step.

1) Go to my.workday.com to log in. Click on the Self Evaluation task on your home screen.

2) Once in the task, click Get Started to proceed.

3) The sections are listed to the left of the page as you proceed through the steps. Review the help text and description in the Job Knowledge section, then click on Rating drop down to select the relevant rating: Extraordinary Year, Successful Year, Opportunities for Improvement or Too New to Rate. Then enter specific details in the Comments field.

Rating Scale:
- Extraordinary Year
- Successful Year
- Opportunities for Improvement
- Too New to Rate
4) Click **Next** to proceed to the next section. **Note:** Click **Save for Later** at any time if you need to stop and continue later.

5) Review the help text in the **Performance Objectives** section. Click on **Add** to enter the SMART goals you and your supervisor agreed you will be rated on. If you are unsure which goals to add, please work with your supervisor. Click on the link to the **SMART Goals Worksheet** for guidance to ensure SMART goals.

   a. Enter your goal. **Note:** For FY 23-24, you will need to copy and paste the goals you set with your supervisor.

   b. Use **Description** field to enter any notes about the goals progress or changes that happened. This will be used when goals are set in Workday in the future every August.

   c. Enter **Due Date**.

   d. Click to select **Performance Objective. Note:** This makes the performance objective available under **Add Existing** in the future.

   e. Select the Mines strategy that aligns with your goal. Click the drop down to select **My Organizational Goals**, then **Colorado School of Mines**, then **2023-2024 CSM Organizational Goals** to see the list of all Mines strategies.

   f. Select the appropriate **Status** for your goal.
g. Select the Rating for the goal you have entered.

h. Then add any specific details to support your rating.

i. Click Add to enter additional goals. Note: If you did any professional development that was not assigned, enter it as a goal and rate as Successful Year if you completed it.
Note: See drop-down menus for Mines Strategies and Status.

6) Click **Next** to proceed to the next section.

7) Review the help text and description in the **Competencies** section. Select the **Rating** for each required competency and add any specific details in the comments. **Note:** Click on the link to refer to the competency document to help you with rating selection. For FY 23-24, employees are not required to enter ratings and comments if they choose not to.

   a. Then scroll down to enter rating and comments for 1-2 of the optional competencies you agreed on with your supervisor.
b. Click Next.

8) In the Supporting Documents section, you have the ability to attach documents or emails you would like to be part of your performance review. These can include kudos, feedback you received from colleagues you partnered with on your goals.

   a. Click Next.

9) In the Overall Assessment of Employee section, select the overall Rating. Add additional details as needed in the Comment box.

   a. Click Next.
10) Scroll down to review the details you have entered then click Submit. Click Save for Later at any time if you need to stop and continue later.

a. The review will now be sent to the supervisor to complete their review.