Workday Performance Management: Completing Manager Evaluation

The Mines Performance Management process takes place in the Workday system. The first step of the process is the employee self-assessment. Once the employee completes their self-assessment, the supervisor will receive a task in Workday to start the Manager evaluation.

Review Process

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

2) Once in the task, read the details before clicking Get Started to proceed.

3) The sections are listed to the left of the page as you proceed through the steps. The Employee Evaluation is on the right side for your reference. 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.
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. Review the goals the employee added. If there are none, click **Add** to enter them. Click on the link to the **SMART Goals Worksheet** for guidance to ensure SMART goals. **Note:** Supervisors can edit the Mines strategy selected in the **Supports** field.

   a. Select the **Rating** for the goal you have entered.
   b. Then add any specific details to support your rating.
   c. 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.
6) Click **Next** to proceed to the next section.

7) Review the help text and description in the **Competencies** section. The **Employee Evaluation** is on the right side for your reference. 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 employee.

8) In the **Supporting Documents** section, check any documents the employee uploaded and attach documents or emails you would like to be part of their performance review.

   a. Click **Next**.
9) In the **Overall Assessment of Employee** section, select the overall **Rating**. The **Employee Evaluation** is on the right side for your reference. Add additional details as needed in the **Comment** box.

![Overall Assessment of Employee](image)

a. Click **Next**.

10) Scroll down to review the details you have entered then click

![Job Knowledge](image)

a. **Submit** to send the review to Manager +1.
b. **Save for Later** if you need to stop and continue later.

c. **Send Back** if you would like the employee to add what they missed. See additional steps for this process below.

### Send Back Process

After reading the employee self-assessment, if details or achievements are missing, the supervisor can send back the review to the employee.

1) On the **Review and Submit** step, click **Send Back**.

2) In the pop-up box, the employee will be auto selected in the To field.
   
   a. Enter the details in the **Reason** field.

   b. Click **Submit**. Note: Let the employee know outside the system what you need them to add.

3) The review will be sent back to the employee. **Note:** They will not see any ratings or comments you selected.

4) Once the employee completes adding the missing details and submits, there will be a task on your Workday Home screen.