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Annual Performance Evaluations—Managers

VUMC Managers will begin the annual performance evaluation process after their employee(s) have completed their self-evaluation or have opted out of the performance review in Workday (the self-evaluation is not required for non-nursing staff). For recently transferred employees, managers can use the Additional Manager Get Feedback template to request feedback from the previous manager. See steps below on how to access the annual performance evaluation and the Additional Manager Get Feedback template. For a full walkthrough of these processes, see **WDHR-802-W5-Annual Performance Review for People Leaders**.

Manager Evaluation
From the Workday Homepage:

1. Select the **My Tasks** icon.

2. Select the **task** titled **Manager Evaluation: Annual Employee Performance Evaluation Template: <Employee Name>**.

Note: If you receive this inbox item before the manager evaluation window opens, it is because your employee has completed the self-evaluation or opted to **Skip This Task** from their inbox.

3. After reviewing the information about the manager evaluation, select **Get Started**.

4. Hover your cursor over the **WalkMe SmartTips** ❓ for additional guidance while completing the evaluation.

Note: If you need to send the evaluation back to the employee to fill out the self-evaluation, skip ahead to **Review and Submit** and select **Send Back** BEFORE filling in any information on the Manager Evaluation.

5. When you get to the section titled **Performance Evaluation Conversation,** follow the instructions in the section.

6. Select the **print icon** to save a PDF version of the evaluation. You can share this PDF with the employee before the annual discussion.

7. After you have completed your discussion, you can access your saved manager evaluation by selecting the appropriate task in **My Tasks**. If needed, you can revise comments based on the performance discussion with the employee.

8. When the evaluation is complete, select **Submit**.

Note: Once an evaluation has been submitted, it **you can no longer edit it.**
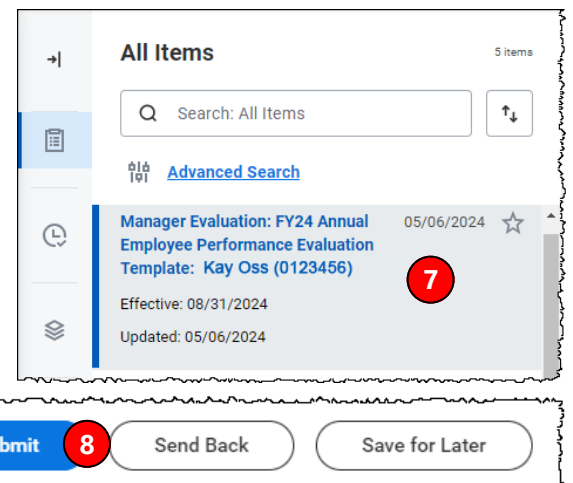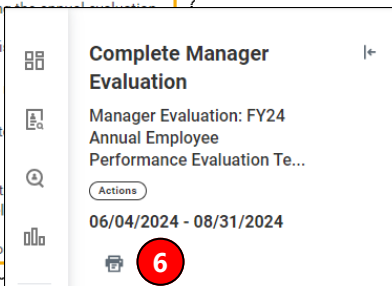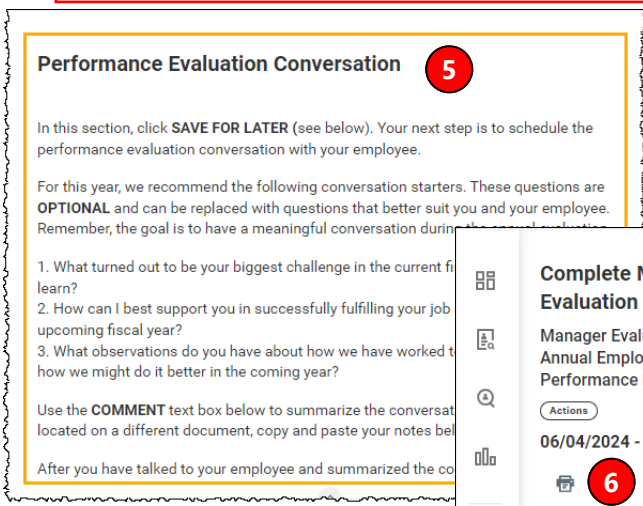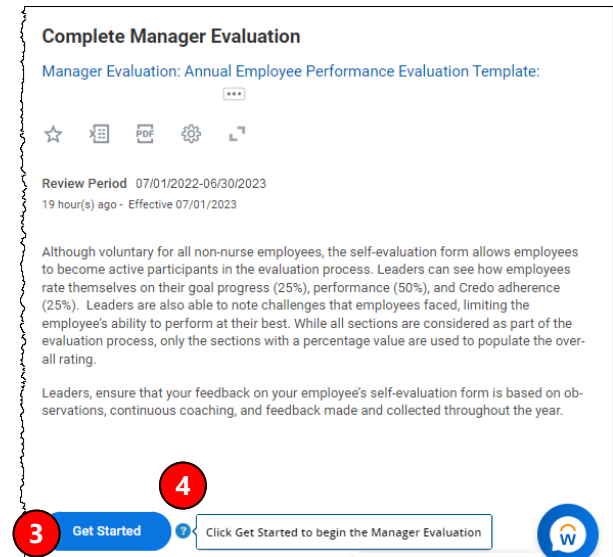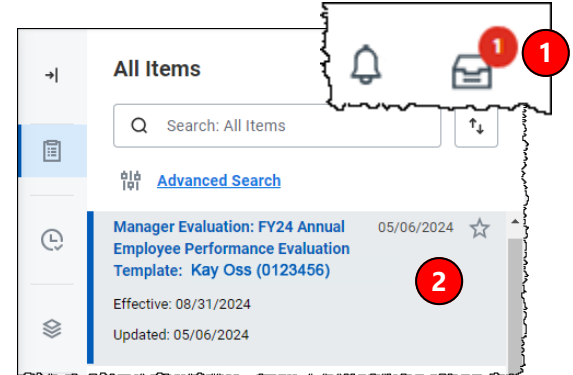
Annual Performance Evaluations—Manager

This is an optional step in the Performance Evaluation process. Managers can request additional feedback from other managers with the **Annual Evaluation Additional Manager Get Feedback template**. Use this option only if you have had an employee who has recently transferred to your department.

Requesting Performance Evaluation Feedback
From the Workday Homepage:

1. In the search bar, type **Get Feedback on Worker**.

2. Select the **Get Feedback on Worker Task**.

3. Select the **Worker** you wish to get feedback on and select **OK**.

4. Select the field next to **Who do you want to request feedback from?** and choose **managers** from whom you would like to hear.

5. Select **Don't Share with <Employee Name>.**

6. Next to **Feedback Template**, the template Feedback on Employee will automatically populate. Select the field and choose **Annual Evaluation Additional Manager Get Feedback Template**.

7. **Edit**, **remove**, or **add** any questions as needed, then select **Submit**. The previous manager will be notified that they have been requested to provide feedback; however, best practice is to send an email letting them know of the request.

Note: The requesting manager will **not** receive a notification when the Annual Evaluation Get Feedback Template is complete.

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Annual Performance Evaluations—Process

The steps below provide a summary of the entire Performance Evaluation Process.

Step 1: The manager will receive a notification in My Tasks to begin the manager evaluation after the employee has completed or opted to skip the self-evaluation, or when the manager evaluation window opens.

Step 2: (Optional) Managers can request additional feedback from other managers with the **Annual Evaluation Additional Manager Get Feedback template**. Use this option only if you have had an employee who has recently transferred to your department.

Step 3: The manager fills out the evaluation. If the manager is planning on sharing the PDF version of the evaluation prior to the performance discussion, they must select the **print** icon to create a PDF. The manager can then save the evaluation by selecting **Save for Later**.

Note: The additional requested feedback will not be visible on the PDF.

Step 4: The manager schedules a performance discussion with the employee and attaches the PDF of the manager evaluation in an email to the employee. If the manager adjusts the overall performance rating after the discussion, an email confirming the updated rating should be forwarded to the employee.

Step 5: After the performance discussion, the manager will update the evaluation, if needed, and then select **Submit**. After submission, the employee will be prompted to acknowledge their Annual Performance Evaluation.

Note: Once the evaluation has been submitted, it **cannot be edited**.

Step 6: The employee will receive a task in **Workday** prompting them to **Acknowledge** the Annual Performance Evaluation.

Step 7: After the employee completes their Acknowledgment, the manager will receive notification in **My Tasks** in Workday prompting them to Acknowledge the Annual Performance Evaluation.

The Annual Performance Evaluation Process is now complete. Completed Annual Performance Evaluations can be found on the Employee's Profile under the **Performance** tab.