



## Annual Performance Evaluations—Managers

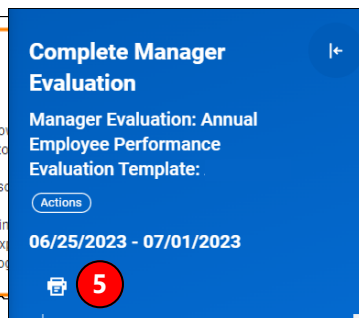
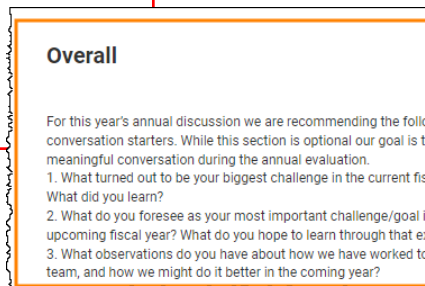
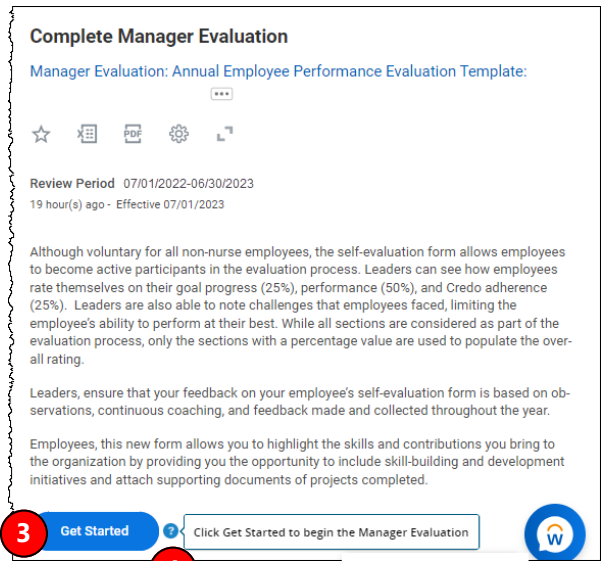
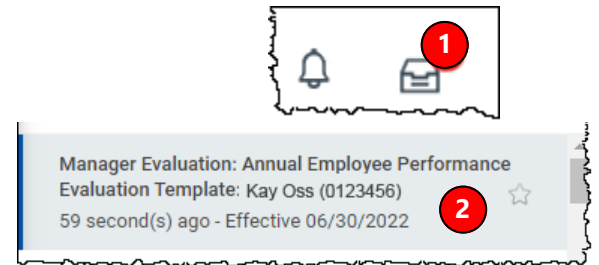
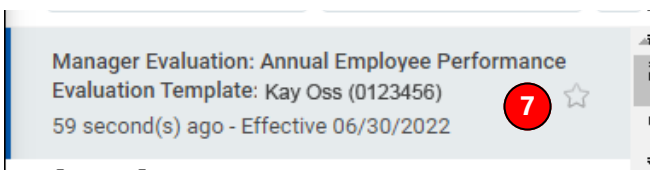
VUMC Managers will begin the annual performance evaluation process after their employee(s) have completed their self-evaluation or have opted out of the performance review in Workday (the self-evaluation is not required for non-nursing staff). For recently transferred employees, managers can use the 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 Task before the manager evaluation window opens, it is because your employee has completed the self-evaluation or opted to **Skip This Task**.
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 **Overall**, select the **print** icon to save a PDF version of the manager evaluation and schedule a performance discussion with the employee with the PDF attached for their review.
  6. Select **Save for Later** before leaving the Manager Evaluation in Workday.
  7. After you have completed your discussion, you can access your saved manager evaluation by selecting the appropriate Task in **Workday**. 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 **cannot be edited**.





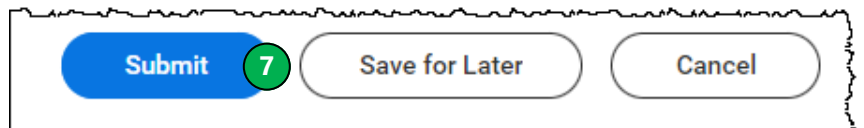
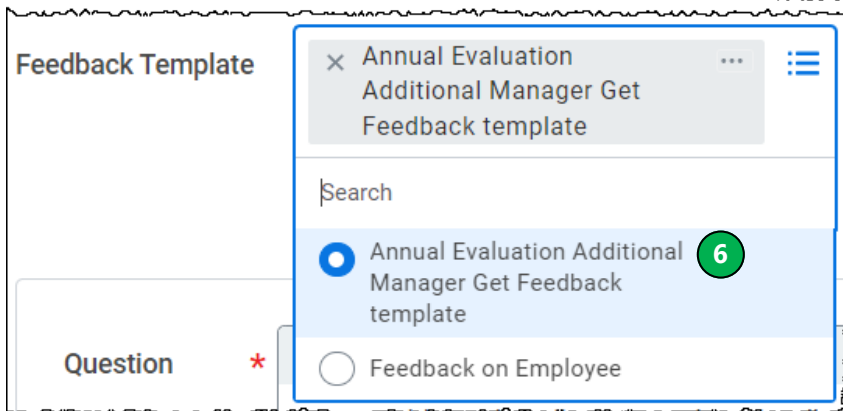
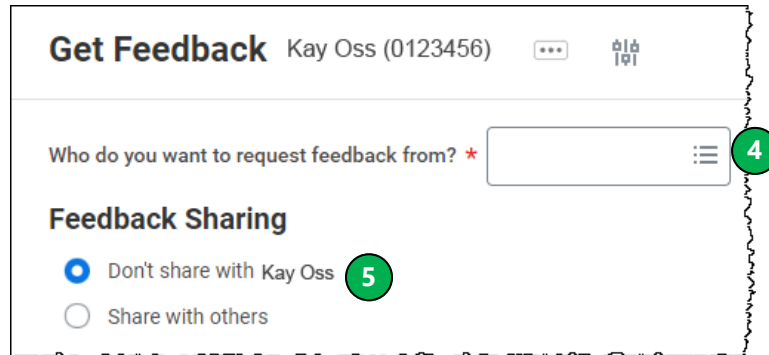
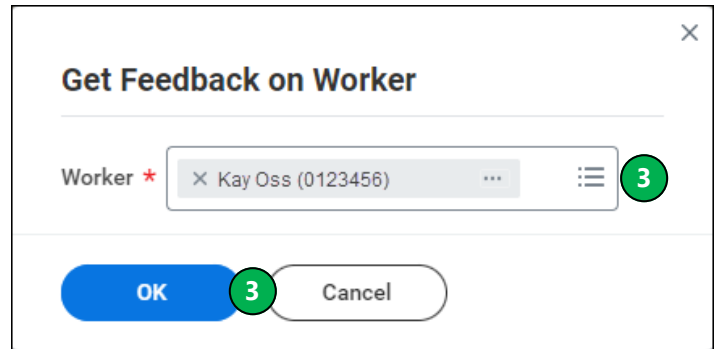
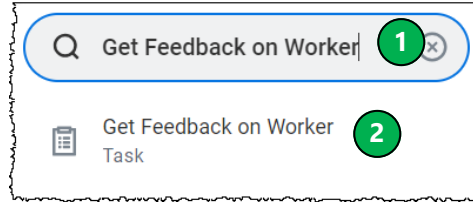
This is an optional step in the Performance Evaluation process. Managers can request additional feedback from other managers with the **Annual Evaluation Additional Manager Get Feedback** template. Use this option only if you have had an employee who has recently transferred to your department.

### 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.





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

**Step 1:** The manager will receive a **Workday Task** 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 conversation, 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**.

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

**Step 6:** Next, the manager will receive the Task **To Do: Complete Performance Discussion**. Select the **To Do** button and then click **Submit**. Only after this step has been taken will the employee be able to acknowledge the evaluation.

**Step 7:** The employee will receive a Task **in Workday** prompting them to **Acknowledge** the Annual Performance Evaluation.

**Step 8:** After the employee completes their Acknowledgment, the manager will receive a Task **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.

#### QUESTIONS?

Please email [BusinessEducation@vumc.org](mailto:BusinessEducation@vumc.org).