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Workday Workshop:

Performance Management
Annual Evaluations For All Employees

Duration: 30 minutes

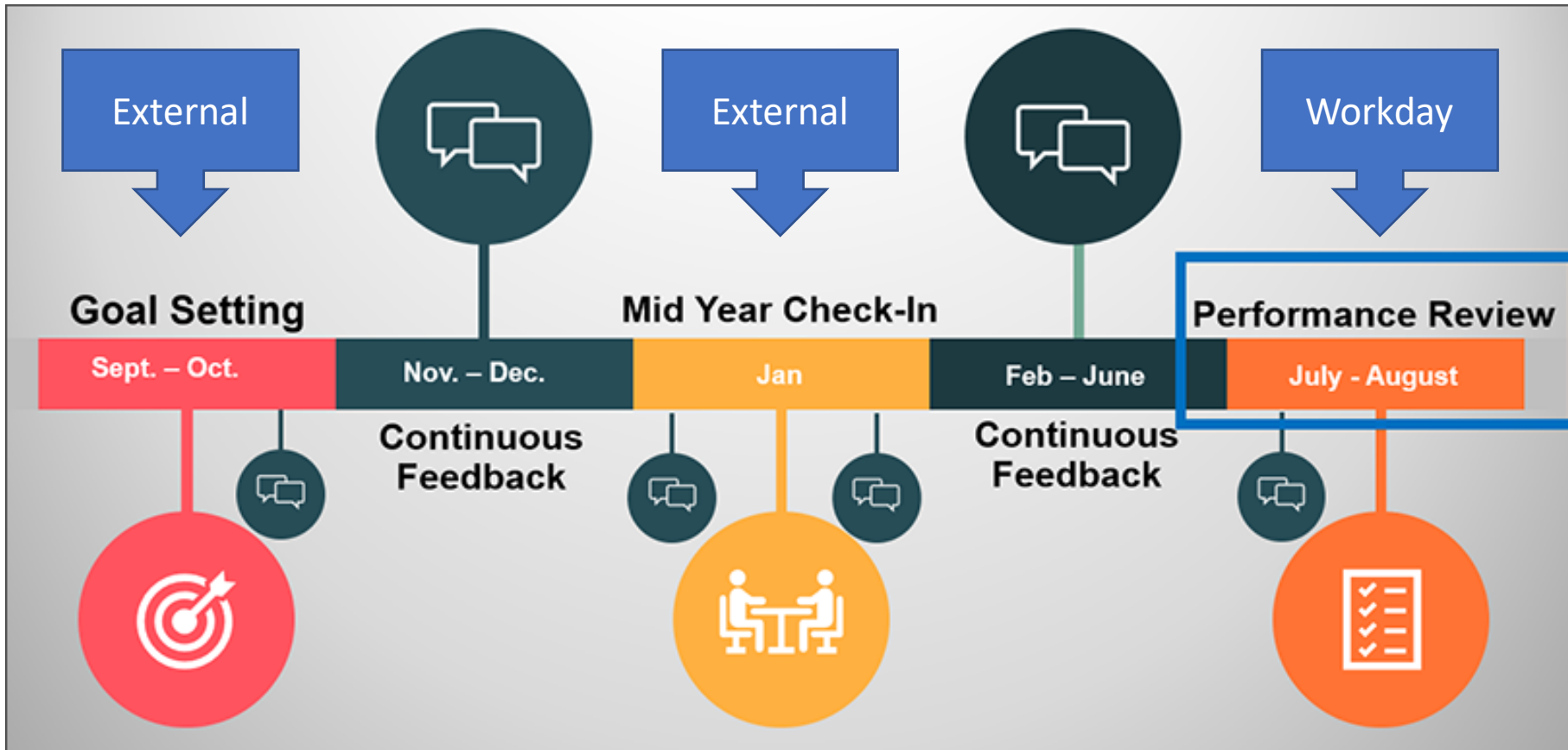# Access Workday through the VUMC Network or VPN

To access all the features and functionality of Workday, you must be on a VUMC network – either by being onsite or by using VPN (BIG-IP Edge Client)

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Workshop Agenda

- Review the Evaluation Timeline

- Access and complete your 'Self-Evaluation'

- Review Manager Accountabilities

- Complete your Employee Acknowledgement

- Review the process of your Performance Evaluation

Sample Evaluation Process Timeline

Note: This timeline is subject to change annually.

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External Individual Goals Form

Individual Goals Form

Instructions

- Use the FY2023 Pillar Goal Handout as your roadmap. (scroll below or click for link)
- Leaders and managers can assign two goals to their team members **or** partner with team members to develop the individual goals. For an example of how the filled-out goal form should look, please see page 4.
- **Double-check** to ensure that the person's goals are measurable, achievable, relevant and time bound.
- Complete one Goal Setting paper template for each team member **by Sept. 30.**
- Several fields within this template require a selection from a drop-down menu. Click on the field to access the drop-down menu.
- If you are required to print this form, do not print until you have entered the required information for all fields.
- Save the goals template so that team members can data enter when Performance Reviews open in WorkDay next Spring.

Sample Goal

Goal	Develop and implement a system-wide survey focusing on XYZ.		
Description/Measure	Goal success will be measured by: 1. Timely development of survey (needs to be completed by x date). 2. Timely implementation of the survey (needs to be implemented by y date). 3. Quality of survey (i.e., no spelling or grammar errors). 4. Increase of survey takers from # to #.		
Category	Performance Goal		
Status	In Progress		
(If the status of goal is *completed*, please put the date goal was completed here)	Click or tap to enter a date.		
Supports/Pillar Goals	**People** Employee Engagement	**Service** Choose an item.	**Quality** Choose an item.
	Growth & Finance Choose an item.	**Innovation** Choose an item.	**Create your own Goal** Choose an item.
Weight	25%		
Due Date	3/31/2023		

Milestones

Milestone	Due Date	Status
Literature Review of X topic	11/11/2022	Completed
Development of Y items	1/6/2023	In Progress
Testing of survey platform	2/10/2023	In Progress
Communication of survey	12/23/2022	Not Started
Implementation of survey	5/5/2023	Not Started

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Add Individual Goals To Profile

External Mid-Year Performance Conversation

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Mid-Year Performance Conversation (Off-system template)

The mid-year conversation is an opportunity to reflect with your team member on current performance. This is separate from the ongoing feedback and adjustments that are a part of the work environment. The organization is recommending that all mid-year conversations be completed by March 31.

What is the purpose of the Mid-Year Discussion?

- Discuss progress on goals: Have milestones been met?
- Surface and address obstacles that prevent progress on goals. Clarify actions to overcome obstacles.
- Give constructive feedback on areas where performance may be lacking.
- Determine if goals need to be adjusted for shifts in organizational or departmental direction.
- Discuss ways to better utilize the employee's skills and check in on career interests.

Instructions:

- The mid-year off-system template includes suggested discussion points to facilitate the conversation with each of your employees.
- Capture key points during the discussion and summarize in the appropriate gray boxes on the following page.
- When mid-year discussion is completed, give the employee the opportunity to add additional comments in the employee section. Then, print to hand to employee and/or send to employee work email as a PDF. Keep a record for yourself based on your normal department practice.

Continue to page two for mid-year discussion template

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Mid-Year Suggested Discussion Topics

Manager Name: Employee Name:

Date of Conversation

Manager Section

How are things progressing with your individual goals? What do you need to deliver on upcoming milestones?

Leader Comments:

We are mid-way through the fiscal year, I'd like to share feedback on areas where I think you are excelling as well as discuss other aspects that will help you have even more impact.
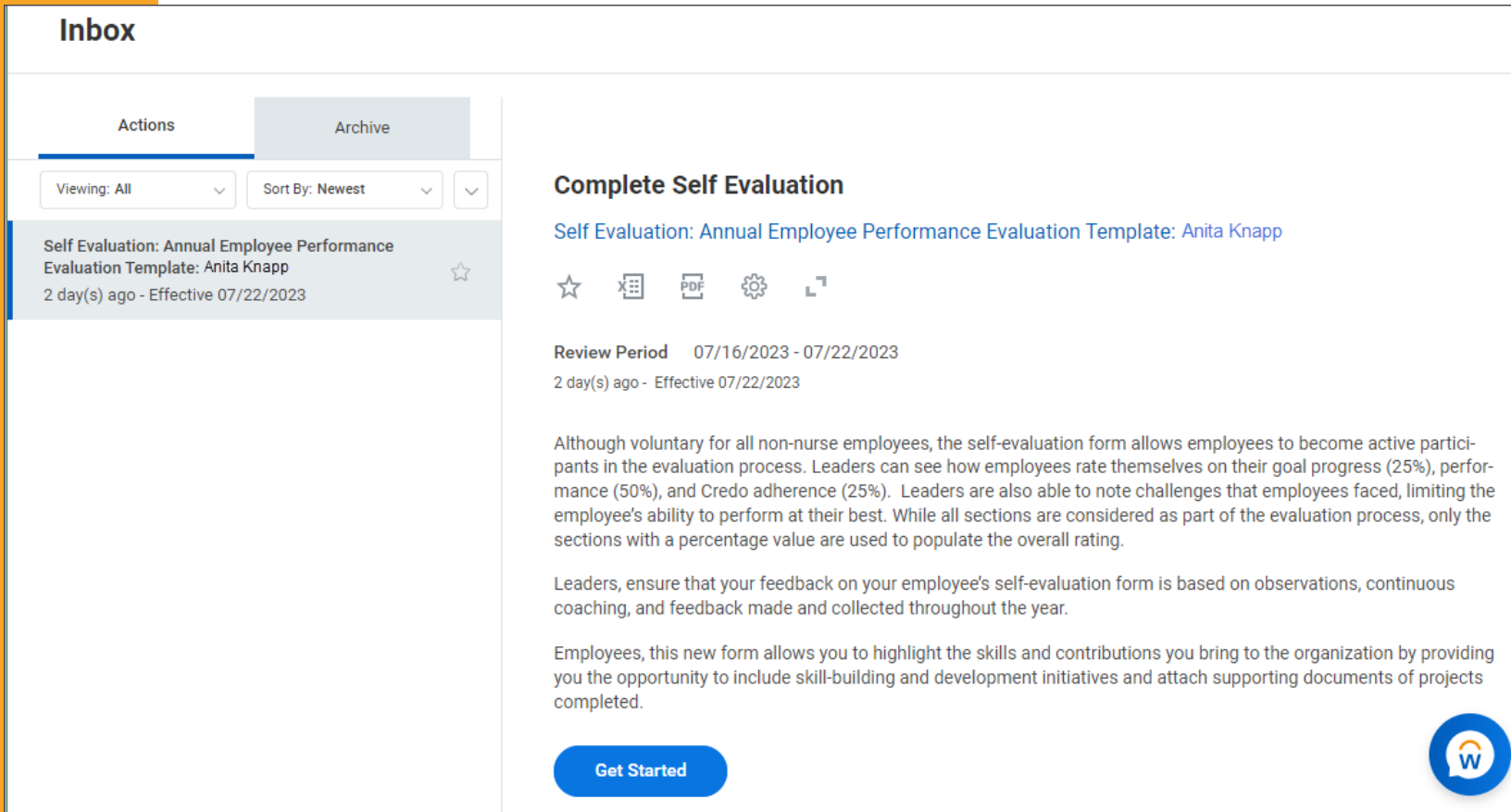
Leader Comments:

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FY2023 Evaluation Timeline

FY2023

Annual Performance Evaluation Timeline

Nursing self-evaluations and peer review process opens in RedCap
July 25

Nursing self-evaluation, peer review closes
Aug 15

Evaluations completed and signed by employee and manager in Workday
Oct 10

July 25
Self-evaluations open in Workday

Aug 15
Managers begin evaluations in Workday

Late Oct
FY24 actions, tactics, and department goals approved by manager

Note: This timeline is subject to change annually.

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Complete Self-Evaluation

Access Self-Evaluation

➡ The employee self-evaluation is sent to all employee's Workday inbox.

➡ When you are ready to begin your self-evaluation, select the Get Started button from the Workday inbox task.

Inbox

Actions	Archive

Viewing: All   Sort By: Newest

Self Evaluation: Annual Employee Performance Evaluation Template: Anita Knapp
2 day(s) ago - Effective 07/22/2023

Complete Self Evaluation

Self Evaluation: Annual Employee Performance Evaluation Template: Anita Knapp

Review Period   07/16/2023 - 07/22/2023
2 day(s) ago - Effective 07/22/2023

Although voluntary for all non-nurse employees, the self-evaluation form allows employees to become active participants in the evaluation process. Leaders can see how employees rate themselves on their goal progress (25%), performance (50%), and Credo adherence (25%). Leaders are also able to note challenges that employees faced, limiting the employee's ability to perform at their best. While all sections are considered as part of the evaluation process, only the sections with a percentage value are used to populate the overall rating.

Leaders, ensure that your feedback on your employee's self-evaluation form is based on observations, continuous coaching, and feedback made and collected throughout the year.

Employees, this new form allows you to highlight the skills and contributions you bring to the organization by providing you the opportunity to include skill-building and development initiatives and attach supporting documents of projects completed.

Get Started

Goals

Two ways to Add goals to the Self-Evaluation:
1. Select the **Add** button > input information from the previously completed external 'Individual Goals Form'.
2. Select the **Add** button > select the **Add Existing** drop-down > select goals that have already been input in your Workday profile by yourself of your manager from the previously completed external 'Individual Goals Form'.

[WDHR-801-Q1_Manage Assigned Goals and Add New Goals](#)

Goal Categories:

➡ **Performance Goals –** always select Performance Goals for the Annual Performance Evaluation. Only Performance Goals count towards your overall goal rating.
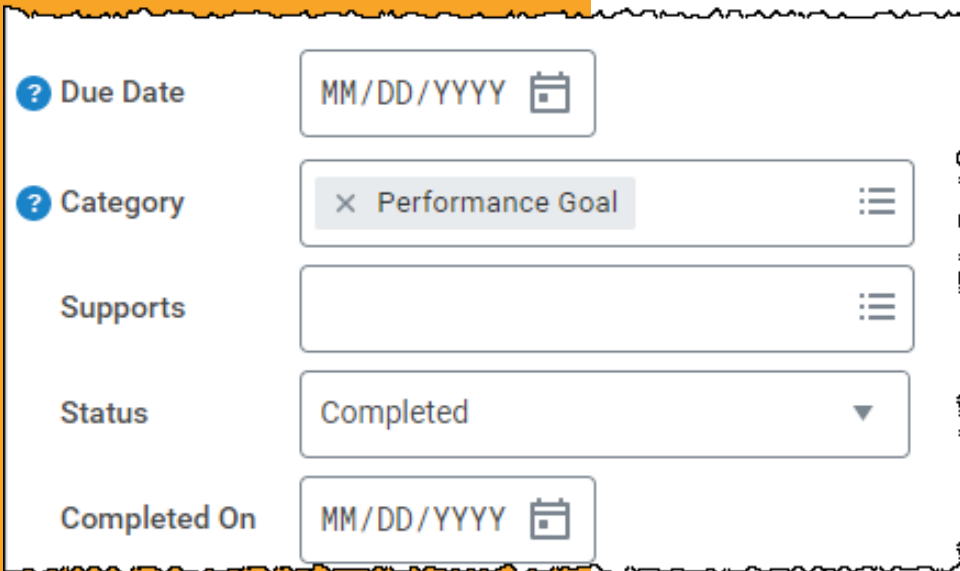
🚫 **Development Goals –** do not select Development Goals for the Annual Performance Evaluation. These goals should not have any weight to them and are not used as part of your overall rating.

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Goal Dates

When setting the completion dates for goal, keep the following in mind:

- If you want goals to be automatically pulled into the annual evaluation, you need to set the goal due date as July 26, 2023. **This is ONLY for the FY23 Evaluation cycle because of the evaluation window.**

- If you are manually adding in your goals while filling out the annual evaluation, you can put the due date that you and your manager agreed to on the off-system goal template.

** Slide added after Workshop

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Optional Sections in the Evaluation

Accomplishments are actions in which the employee went above and beyond to help their team and/ or department accomplish a performance goal.

Development Items are skills, knowledge and/or abilities that an employee needs to be successful in their current position or in future positions they aspire to.

- **Professional Development**: the process of preparing for future job positions the employee may aspire to.
- **Skill Enhancement**: the process of building and improving skills specific to current job requirements.

Supporting Documents provide information specific to recent achievements, successful completion of performance goals, development goals, and/or development items.

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Manager Accountabilities

Manager Accountabilities

Request additional manager's feedback (if applicable)

Complete manager evaluation

Schedule & complete a performance discussion with employee

Acknowledge employee's Acknowledgment

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Complete Employee Acknowledgement

Annual Evaluation Employee Acknowledgement

DEMO

End of Orientation Acknowledgement

EOO Employee Acknowledgement

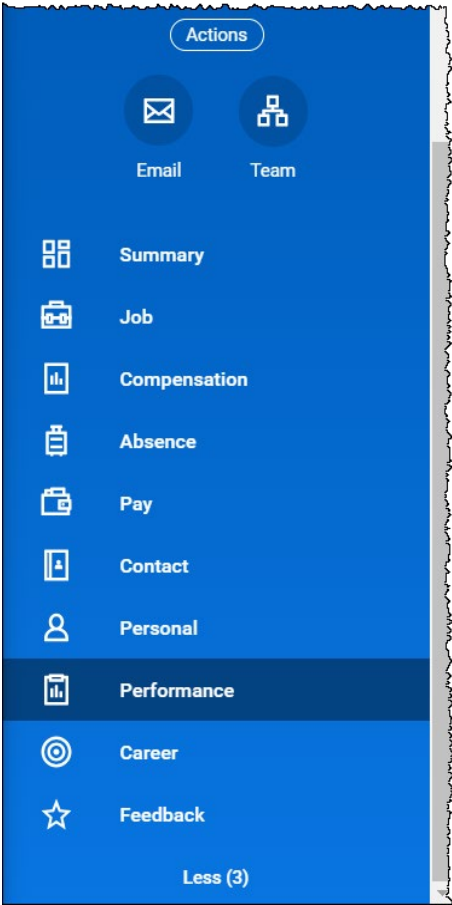# Review the Process

Find Completed Performance Reviews

Employees can access their completed Performance Evaluations and their End of Orientation Evaluation under Performance in the employee's profile.

Conclusion

Key Takeaways

Access
- Access your Self-Evaluation from your Workday Inbox from July 25th-August 15th.
- You must be on the VUMC network or logged in to VPN to see the WalkMe SmartTips.

Notifications
- All Annual Evaluation notifications will be in Workday. Employees will not receive any notifications in Outlook.

Goals
- Check with your manager about their expectations for inputting goals in the self-evaluation.
- All goals should be Performance Goals on the Annual Evaluation.

Review and Submit
- Changes cannot be made after submission. Review all sections before hitting the submit button.
- Manager and employee must acknowledge the evaluation.

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Resources

[WDHR-801-W2_Annual Performance Evaluation for Employees](#)

[QRG_Annual Performance Evaluations for Employees](#)

[QRG_Manage Assigned Goals and Add New Goals](#)

For questions related to the Performance Management process, please contact your HR Business Partner.
If you are having technical issues with the Performance Management process in Workday, please contact Workday Help

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