



VUMC
BUSINESS
EDUCATION

Workday Workshop:

Performance Management
Annual Evaluations & End of Orientation
For Managers

Duration: 45 minutes

Access Workday through the VUMC Network or VPN

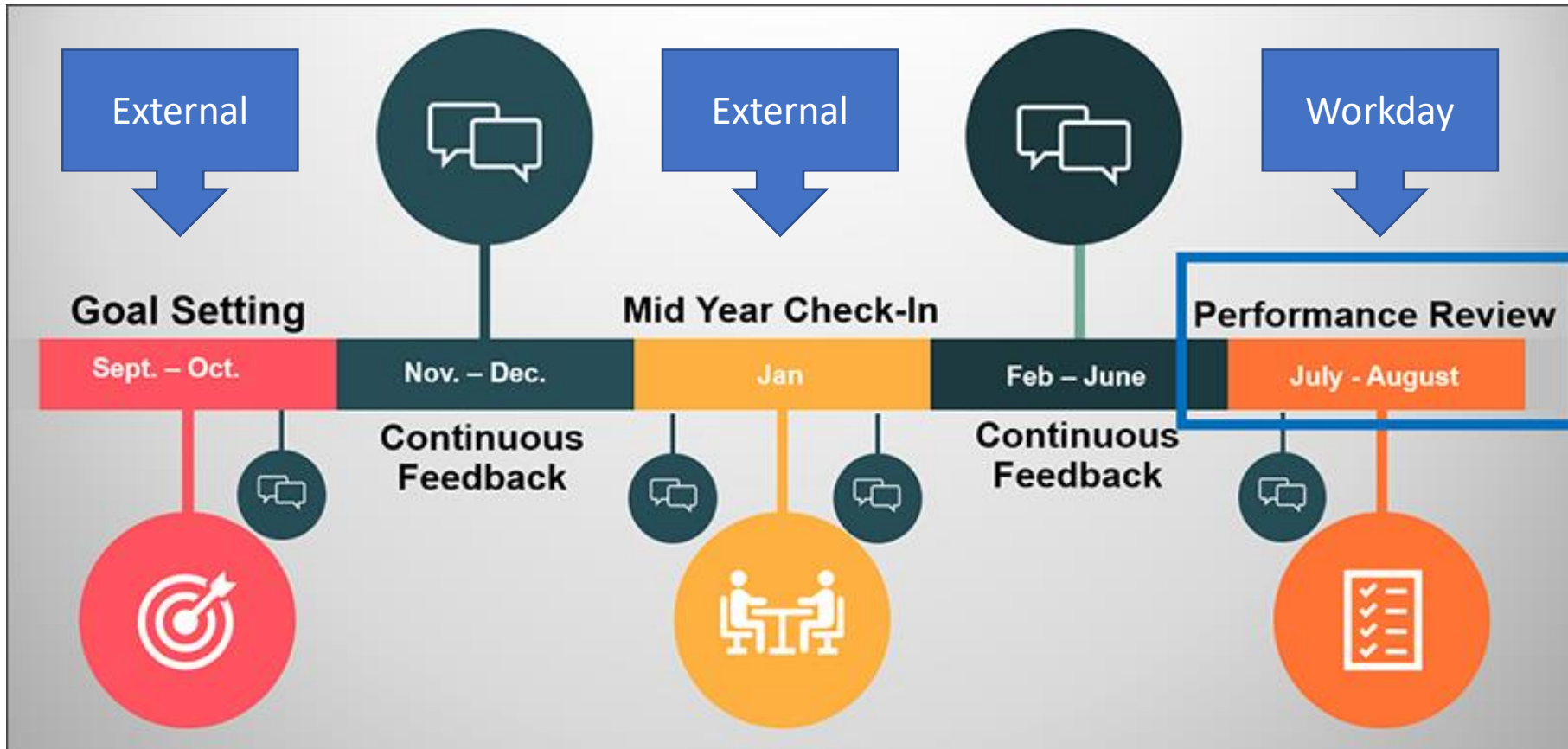
To access all the features and functionality of Workday, you must be on a VUMC network – either by being onsite or by using VPN (BIG-IP Edge Client)



Workshop Agenda

- Review the Evaluation Timeline
- Review Employee Accountabilities
- Request Feedback from another Manager
- Access and complete a Manager Evaluation
- Complete a Manager Acknowledgement
- Review the process of the Performance Evaluation
- Complete an End of Orientation form

Sample Evaluation Process Timeline



Note: This timeline is subject to change annually.

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

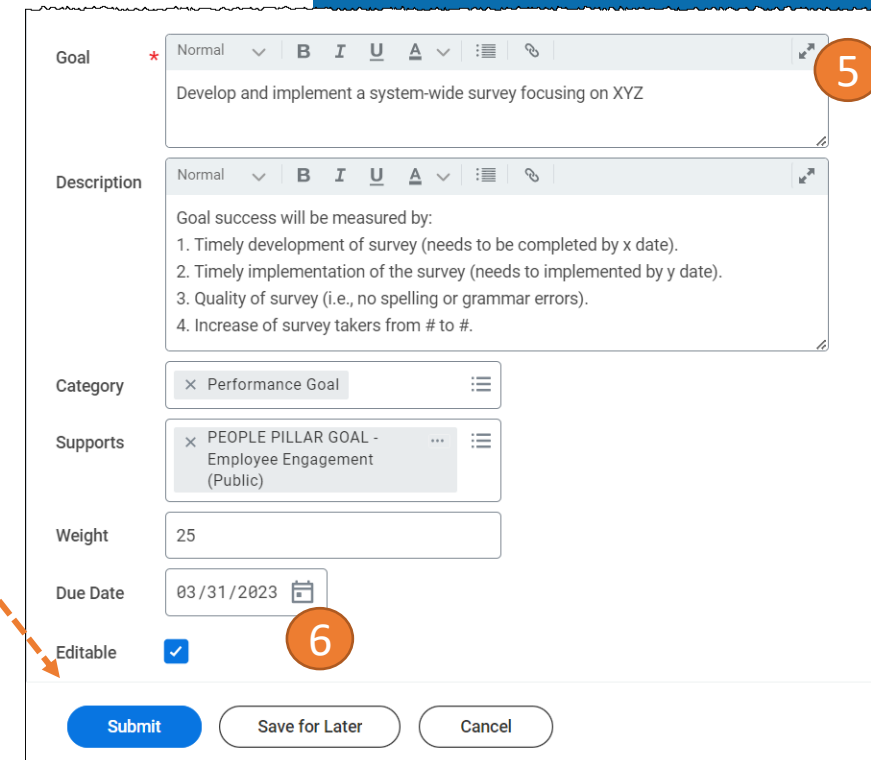
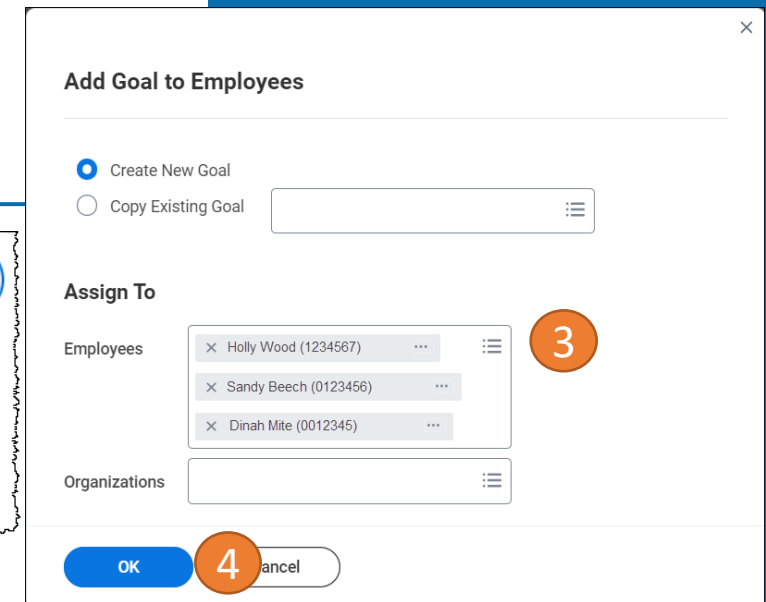
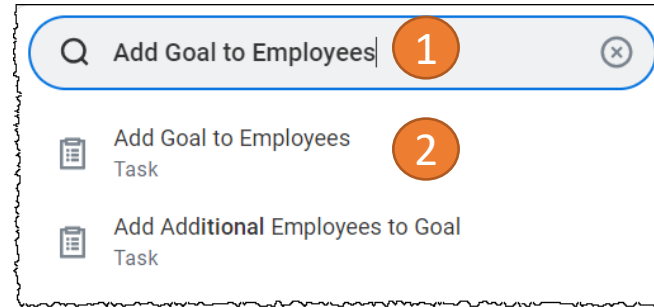


Set goals on behalf of employees

1. Type **Add Goal to Employee** in the search bar.
2. Select the **Add Goal to Employee Task**.
3. Select either individual **Employees** to assign the goal to, or an entire **Organization**.
4. Select **OK**.
5. Fill in the **appropriate fields** on the form. Fields marked with red asterisks (*) are required.
6. Select **Submit**.

Note: More than one goal can be added at a time. Use the **Add** button to do so. Use the **Remove** button to delete a goal.

[WDHR-801-Q1 – Manage Assigned Goals and Add New Goals](#)
[WDHR-802-Q1 – Setting Goals on Behalf of Employees](#)



Off-System Mid-Year Performance Conversation

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

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:

Sample Evaluation Timeline



Note: This timeline is subject to change annually.

Employee Accountabilities

Employee Accountabilities

Employee will complete the self-evaluation or will opt to skip the evaluation. Nurse employees **DO NOT** complete the self-evaluation in Workday.

After the manager completes and submits the manager evaluation, the employee must review and acknowledge the evaluation from their inbox.

Request Feedback



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Requesting Feedback

Managers should only request feedback from another manager with whom the employee has worked under.

Get Feedback ⋮

Who do you want to request feedback from? *

Feedback Sharing

Don't share with

∨ **Questions**

Feedback Template

The feedback will not be visible for the employee on the Performance Evaluation; however, it will appear on the Manager Evaluation under Feedback when completed.

Complete Manager Evaluation



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Button Overview



Back: return to the previous page

Next: continue to the next page

Save for Later: evaluation responses will be saved and can be access from the Workday Inbox

Close: exit the evaluation, responses will not be saved

Submit: evaluation is complete, edits cannot be made after submission

Send Back: evaluation is returned to employee, manager responses will not be saved

Access Manager Evaluation

- The manager evaluation can be accessed from the manager's Workday inbox
- When ready to start the manager evaluation, the manager should select **Get Started** to access the task

Inbox

Actions

Archive

Viewing: All

Sort By: Newest

Manager Evaluation: Annual Employee Performance

Evaluation Template: Kay Oss (0123456)

59 second(s) ago - Effective 06/30/2022

Complete Manager Evaluation



Manager Evaluation: Annual Employee Performance Evaluation Template:



Review Period 07/16/2023 - 07/22/2023

1 hour(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.

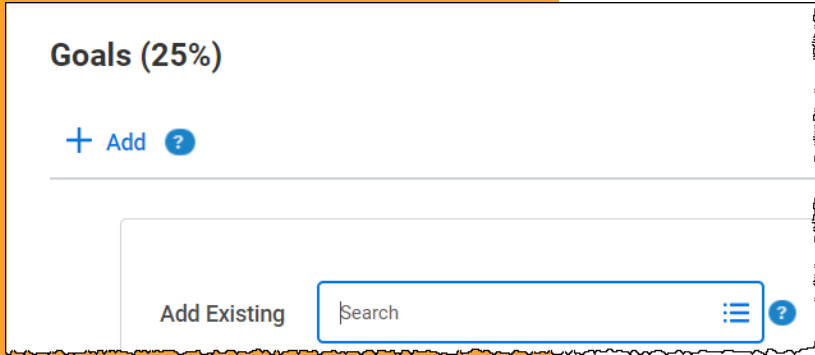
Leaders, ensure that your feedback on your employee's self-evaluation form is based on observations, continuous coaching, and feedback made and collected throughout the year.

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



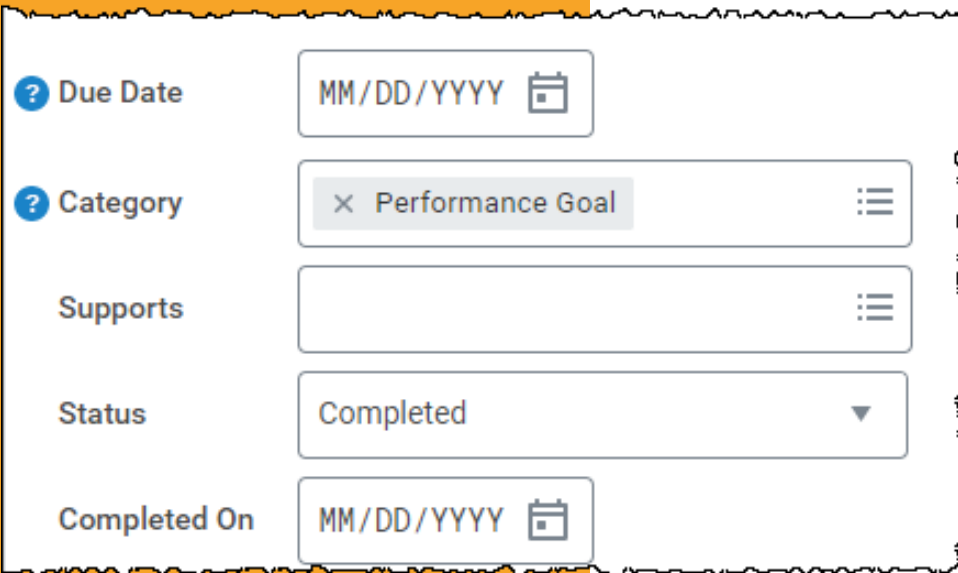
Goals



- Goals can be added via an external goal template or on the manager or self-evaluations
- Categories:
 - ➔ **Performance Goals** – always select Performance Goals for the Annual Performance Evaluation. They are the only goals that will count toward the overall rating
 - ⊘ **Development Goals** – while useful in other situations, do **NOT** select Development Goals for the Annual Performance Evaluation
- For the FY23, choose between:
 - Add employee goals while filling out the Manager Evaluation
 - Request that employees input their goals
 - If choosing this option, managers should check the Goals section first when completing the manager evaluation and use the Send Back option if no goals are visible

Goal Dates

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



A screenshot of a goal configuration form in Workday. The form has a white background with a thin border. It contains five fields: 'Due Date' with a calendar icon and 'MM/DD/YYYY' placeholder; 'Category' with a dropdown menu showing 'Performance Goal' and a close button; 'Supports' with a dropdown menu; 'Status' with a dropdown menu showing 'Completed'; and 'Completed On' with a calendar icon and 'MM/DD/YYYY' placeholder.

- If you want your employee's goals to be automatically pulled into the annual evaluation, you need to put the employee's 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 employee's goals while filling out the annual evaluation, you can put the due date that you and your employee agreed to on the off-system goal template.

** Slide added after Workshop

Optional Sections

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.


Overall





If you think you would like to edit your annual evaluation after you have had your performance review discussion with the employee, you can create a PDF of the annual evaluation to send to your employee and then select **Save for Later**. Once you have had your annual evaluation conversation, you can go back in, revise where needed, and select Submit.

Once you Submit, you are **no longer able to edit your evaluation**.

Manager

Default Rating  Fully Meets Expectations

Rating 

Override Calculated Rating 

Compliance

The Compliance Section has been removed from the Annual Evaluation because the start of the annual evaluation has surpassed the June 15 Compliance Deadline.

VANDERBILT UNIVERSITY MEDICAL CENTER My Compliance Help Logout

Compliance Portal

My Compliance
Anita Knapp
0123456
Medical Professional
000000 - Department

Close of Compliance Period: 06/30/2023 Period: 2022-2023 ▼

Description	Status	Date Completed
2023 FY Annual Training (required course)	Complete	03/03/2023
Conflict of Interest	Complete	02/02/2023
Exclusion Screening Initial	Complete	05/11/2022
Immunization and Screening	Complete	06/30/2023
Workplace Violence Prevention Overview	Complete	05/04/2022

Managers can still access their employee's compliance information from the Compliance Portal.

<https://complianceportal.app.vumc.org>

Complete Manager Acknowledgement



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Manager Acknowledgment

After the employee submits their acknowledgment, the manager will be prompted to complete their manager acknowledgement of the performance evaluation from their Workday Inbox.

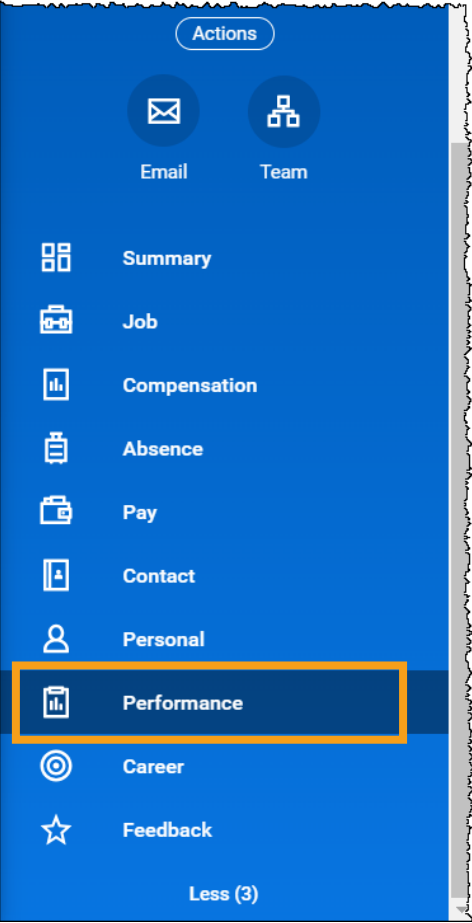
Acknowledgement

Manager	Employee
Status *	Status Acknowledge without Comments
Comment	Comment
Acknowledged By	
Acknowledgement Date	07/18/2023 10:03 AM

Review the Process

Find Completed Performance Reviews

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



The screenshot shows the 'Performance Reviews' section of an employee's profile. The 'Performance Reviews' tab is highlighted with an orange box. Below the tabs, there is a table with 2 items in progress. The table has columns for Review, Contains Hidden Sections, Review Period (Start Date, End Date), Status, and Awaiting. Each row has 'View' and 'Create' buttons.

Review	Contains Hidden Sections	Review Period		Status	Awaiting	View	Create
		Start Date	End Date				
Annual Employee Performance Evaluation Template:	Yes	07/16/2023	07/22/2023	Provide Manager Review Comments		View	Create
End of Orientation Evaluation - Ad Hoc:	Yes - All	07/16/2023	07/22/2023	Complete Manager Evaluation for Performance Review		View	Create



End of Orientation



DEMO

EEO Process

1. When the employee has reached the end of their orientation period (6 months for exempt employees, 90 days for non-exempt employees) the manager will receive a notification to their Workday Inbox prompting them to complete the End of Orientation Manager Evaluation.
2. After manager completes the End of Orientation Evaluation, they will meet to discuss the evaluation with the employee. Manager will need to confirm that they have met from a task in their inbox.
3. Employee will review and acknowledge the End of Orientation Evaluation. This acts as a signature.
4. The End of Orientation Evaluation can be found in the employee's profile under Performance and Performance Reviews.

Evaluation Topics

Evaluation Ratings (*Rating Response*)

- Quality of Work
- Quantity of Work
- Credo
- Ability to Learn
- Initiative
- Availability

Competencies and Requirements (*Yes or No response*)

- Employee has completed Compliance Requirements
- Employee has completed Department Competencies/Onboarding
- Employee and Manager have reviewed the Employee's Job Description
- Employee and Manager have established and reviewed goals and have entered them in Workday

Strengths and Development Opportunities (*Short answer response*)

Conclusion

Key Takeaways

Access

- If the leader selects **Send Back** or **Close**, all information that they have input to the Manager Evaluation will be deleted.
- You must be logged into the VPN to access and use the Walkme Smart Tips.

Feedback

- When requesting feedback, if you can select a privacy option, select **Do not share with employee**.
- Manager Requested feedback will appear on the Manager Evaluation only.

Goals

- Ensure that employees are aware of your expectations for inputting goals
- All goals should be Performance Goals on the Annual Evaluation.

Overall

- Print PDF icon is available if you need it for your discussion with the employee.
- Managers can have their discussion with the employee prior to submission of the evaluation and changes can be made.

Review and Submit

- Changes cannot be made after submission, be sure to review all sections before hitting submit.
- Manager must acknowledge the evaluation after the employee.

Compliance

- Compliance has been removed this year because the start of the annual evaluation has surpassed the June 15 compliance deadline.

Resources

[WDHR-802-W5 Annual Performance Evaluation for Managers](#)

[QRG Annual Performance Evaluations for Managers](#)

[QRG Manage Assigned Goals and Add New Goals](#)

[QRG Setting Goals on Behalf of Employees](#)

If you have questions, please contact your **HR Business Partner** for issues related to the Performance Management processes or submit a **Workday Help Ticket** in Pegasus for any technical issues in Workday.



Questions?