Workday Job Aid
Self-Evaluation

Use this job aid to complete your self-evaluation as part of the annual performance review process. The self-evaluation is completed prior to the annual review.

To learn more, find job aids and videos at http://workday.trinity-health.org.

For additional assistance, contact your Tier 1 resource, as noted on the Workday Help website.
Self-Evaluation

Business Process Steps and Roles

Process roles are designated by “security role,” which do not reflect actual job titles. People may have multiple roles.

Self-Evaluation

The self-evaluation is the first step in the annual performance review process. It provides a way for the colleague to give their input into their evaluation. It is the colleague’s responsibility to complete it. The self-evaluation is optional, however, colleagues should not skip this part of the annual performance review process unless the decision to do so has been discussed with the colleague’s manager.

- The self-evaluation will be in the colleague’s Workday Inbox June 1 and should be completed by 11:59 PM EST, June 30.
- Colleagues will not have the opportunity to complete the self-evaluation after June 30 because it will disappear from the Workday inbox; and they will not be able to provide input on their annual performance review.
- However, the colleague’s manager may choose to send the review back to the colleague to complete the self-evaluation step prior to the manager completing the review.

- Complete the self-evaluation: Colleague
- Review colleague’s self-evaluation: Manager
1. Log into Workday
2. Click the Inbox
Self-Evaluation

3. Look for the **Self Evaluation Annual Performance Review** inbox item.

**NOTES:**
- Executives will see the Executive Annual Performance Review
- Leaders will see the Leader Annual Performance Review
- Colleagues (non-leaders) will see the Staff Annual Performance Review.
Self-Evaluation

**NOTE:**
Best practice is for colleagues to complete their self-review to share their own perspectives with their manager. Click **Skip This Task** only if your manager has given you instructions to do so, which advances the review to the Manager Evaluation step.

**NOTE:**
Click **OK** (the next screen will come up) if you click **CANCEL** the task will remain in the inbox.
Self-Evaluation

4. To complete the Self-Evaluation, click Go to Guided Editor

Or Click Go to Summary Editor to scroll through the entire Summary page
Self-Evaluation

Now you will begin to assess your Goals, Core Values, Role Specific Accountabilities of the Job Description, and add Supporting Documents (if applicable).

5. Click on the Goals and criteria to review and update the goal status:
   - Click **Weighting** to change the weight of a Goal
   - Type the new weight
   - Click the checkmark to accept the change

6. View, add and or edit **Milestones**

**IMPORTANT:** See the Appendix (page 15) for instructions on how to pull Goals into the review.

Click the edit icon to continue with this section
Click the checkmark to accept changes
Type the new weight

SCREEN CONTINUES ON NEXT PAGE
Self-Evaluation

7. Click the drop-down-arrow in the **Rating** field to select your rating for each Goal

8. Type a Comment

9. Click **Next** to assess your next goal

**NOTE:** The definition for each rating will appear **after** you select a rating for the Goal.
Self-Evaluation

10. Review each Core Value and the Behaviors associated with it.

11. Scroll down to the Rating area. Under Rating, click the drop down arrow to select the Rating that indicates how often you displayed the Core Values.

Click the edit icon to continue with this section

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**Self-Evaluation**

12. Under the **Summary** section in the **Comment** field, type **Comments** for all **Core Values** (optional)

13. Click **Next**
Self-Evaluation

14. For **Role Specific Accountabilities of the Job Description**, select a **Rating** on performance of your job duties.

15. In the **Comment** field, type a **Comment** on your performance of job duties.

16. Click **Next**

**NOTE:** You must rate and comment on the Role Specific Accountabilities of the Job Description section or the Workday system will show an error message; and you will not be able to move forward with your self-evaluation.
Self-Evaluation

16. To attach a document, click Add and click Attach, follow the remaining steps – this is optional and is helpful if there are specific documents that support your self-review.

17. Click Next.
Self-Evaluation

18. Click **Submit** when you have completed your self-evaluation.

**NOTE:**
When you click **Submit**, if you have **not** rated yourself on any goal or provided comments, or if the weight of your goals do not total 100, you will receive an error message. Click the X on the Error message to clear it, and add the missing information.

The sum of all weights for Goals must equal 100. Current total is 50. Goals (Leader Annual Performance Review) for Kevin F Preston (1111111)
Self-Evaluation

**End of Process: Next Steps**

- Manager receives a Workday Inbox task to review and complete colleague evaluation
- Manager receives a Workday Inbox task to send an Additional Manager evaluation (optional)
- Manager receives a Workday Inbox task to review the Get Feedback requests
- Manager may choose to add additional names of people to Get Feedback
- Manager will submit requests to Get Feedback
- Feedback requests will be in the Workday Inbox of those selected to provide feedback
- Colleague completes the Integrity and Compliance documents
- Manager and Colleague have a face to face annual performance evaluation meeting
- Colleague signs off on the Annual Review and Integrity and Compliance Acknowledgement
- Manager signs off on the Annual Review and Integrity and Compliance Acknowledgement
Adding or Pulling Goals into the Annual Performance Review

**Process Steps**

1. When you begin completing the self-evaluation and need to add Goals at this time, click **Add**

2. To pull in an existing Goal, click **Use Existing Goal**

**NOTE:** If a Goal is not showing in the self-evaluation review, or you want to add one or more Goals, follow these steps.
Adding or Pulling Goals into the Annual Performance Review

**Process Steps**

3. Select a People-Centered 2020 Goal Category

**NOTE:**
It is important to know the People-Centered 2020 Category connected to a cascaded Goal. If this is not known, click on each category until the Goal appears.
Adding or Pulling Goals into the Annual Performance Review

**Process Steps**

4. Click the Goal to pull it into the annual review See the **Operational Excellence** example
Adding or Pulling Goals into the Annual Performance Review

**Process Steps**

5. Type a **Weighting** for the Goal. It may be necessary to re-weight all Goals to total 100%. All Goals must total 100% to successfully submit the annual review.

6. Click **Submit**.